Collector User Guide
Getting Started

Getting Started

Introduction

Collector is a trauma registry system that helps users meet the changing requirements for collection and evaluation of trauma data for quality assurance, accreditation, management, prevention and research. The system is a comprehensive data management and report generating package which includes a user-friendly data entry and verification system, powerful querying capabilities, seamless integration with expert coding software (Tri-Code), and support of outcomes scores and analysis. Collector is a fully Y2K-compliant Windows product and offers unrivaled coding, database and analysis capabilities.

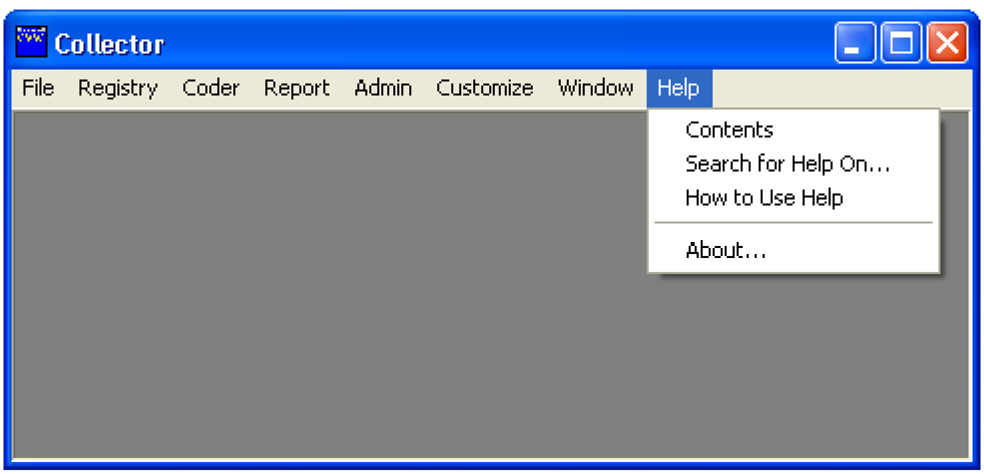
Help and Resources

⇨ *On-Line Help*

Help information is available within the Collector software from any screen. The on-line help contains step-by-step directions on how to complete the most basic to the most complex tasks in Collector.

⇨ *Accessing On-Line Help*

1. Select the Help menu located at the top of the main screen to display the help menu options and select an option from the menu.



OR

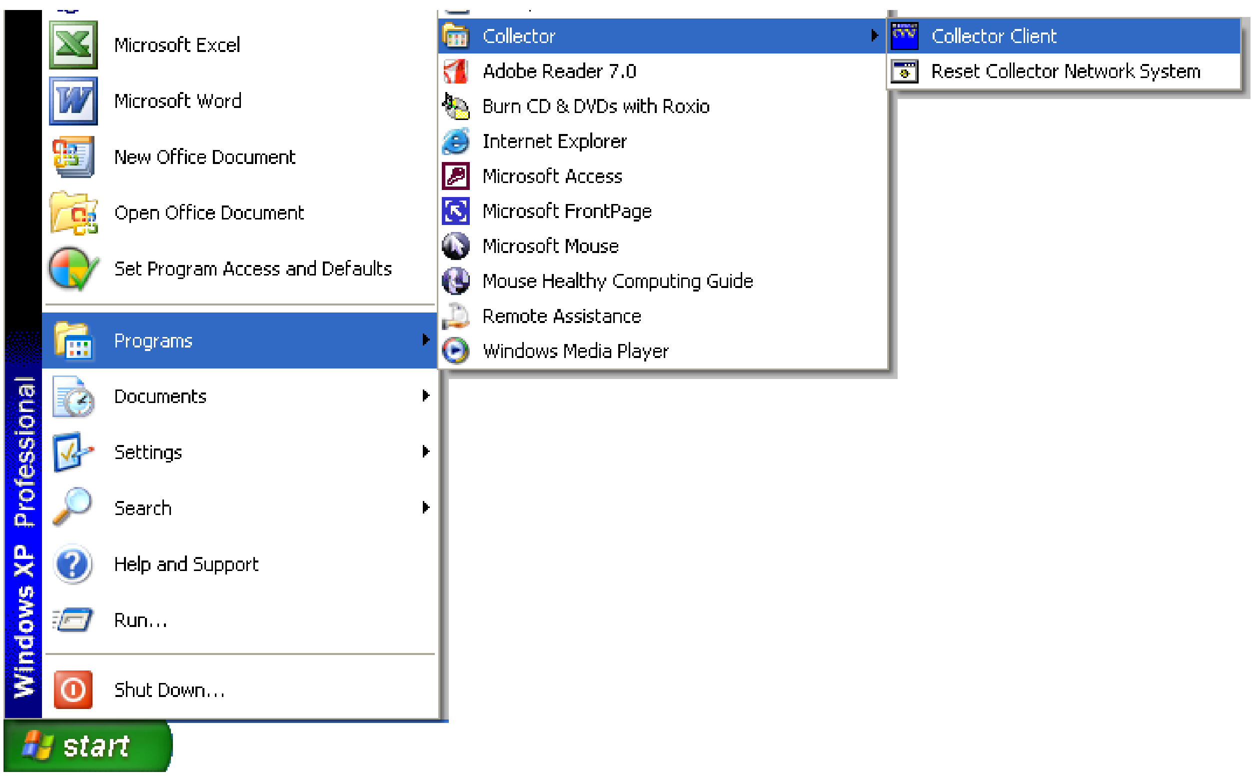
Access context-sensitive help regarding the current screen by clicking the [Help] button found on most screens.

About Collector

Here you will find information regarding your collector installation version.

First Time Use

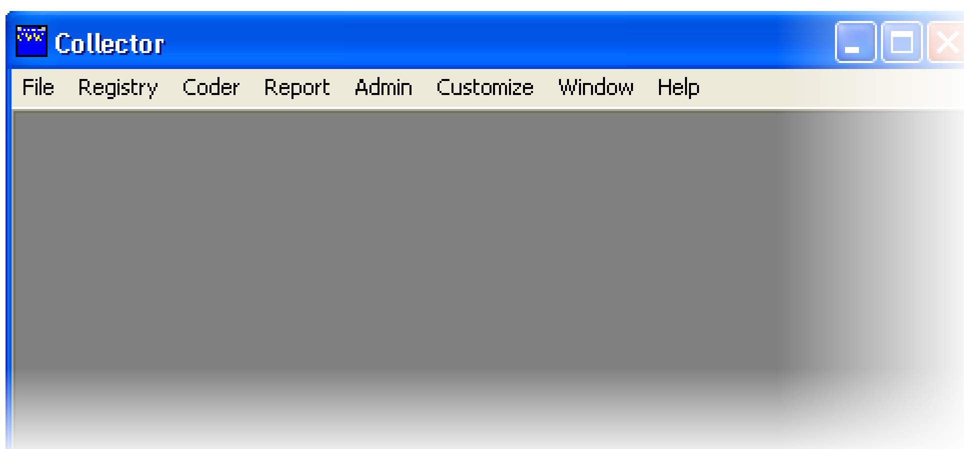
1. To open Collector from the Start menu, click on the Collector icon created during the installation process.



2. The Collector Login screen will appear.

3. At the Login prompt, use COLLECT for the user name and “password” (case sensitive) for the password.

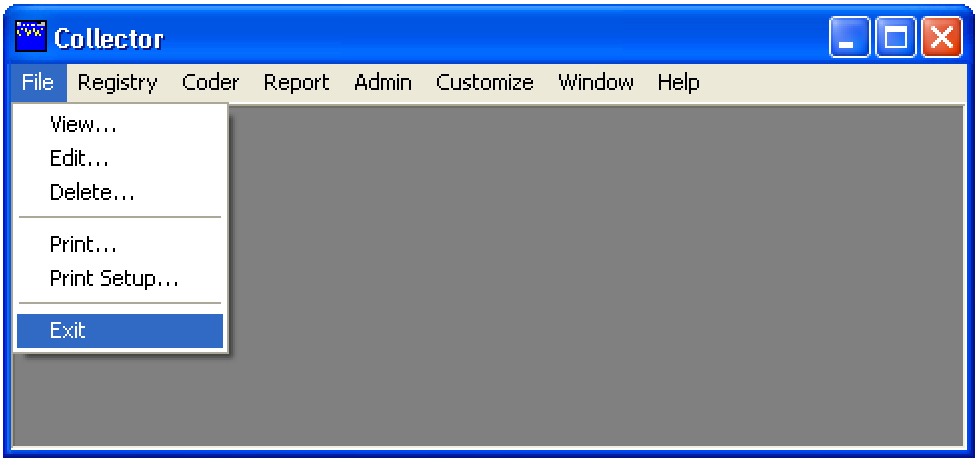
4. The Collector menu bar will appear.



Exiting the Software

At the end of each Collector session, exit the software in order to prevent network conflicts or unauthorized access.

1. To Exit Collector, select “Exit” from the ***File*** menu.



OR

2. Click the [X] in the upper right hand corner of the Collector software.

Software Navigation

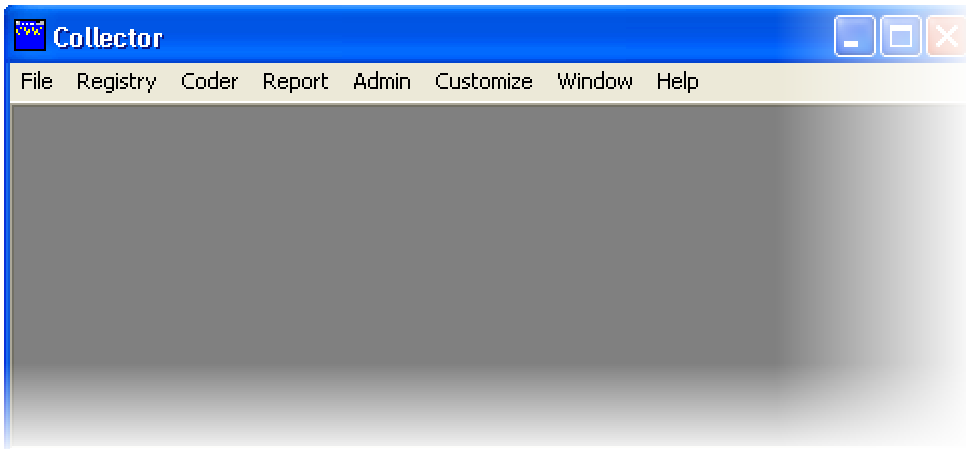
Collector Menu Structure

- File
  - View
  - Edit
  - Delete
  - Print
  - Print Setup
  - Exit
- Registry
  - Database
    - Add Record
    - Modify/View Record
    - Renumber Record
    - Delete Record
    - Browse Records
  - Run Checks
- Coder
  - Batch Mode
  - Interactively Code Records
  - Lookup Wizard
  - Add Synonym
- Report
  - Run Report
  - Create Gather File
  - Create Graphics Import File
  - Run CVW Batch
  - Query
    - New
    - Open
    - Print User Queries
    - Display User Queries
  - Report
    - New Data Table Report
    - New Statistics Report
    - New RDL Report
    - Open
  - Gather Spec
    - New
    - Open
  - Coded Variable
    - New
    - Open
    - Print Coded Variables
    - Display Coded Variables
  - CQO Folder
  - Rebuild
    - CQO
    - Reports, Queries
- Admin
  - Diagnostics
    - Pack Deleted Records
    - Reindex Data Files
    - Test Database Structure
    - Repair Damaged Database
  - Import
  - Export
  - DBF Export
    - New
    - Open
    - Run
  - Transfer
  - Accounts
    - Add
    - Modify
    - Delete
- Customize
  - Colors and Fonts
  - Options
  - Data Entry Defaults
  - Data Elements
  - Popup Menus
  - Change Password
  - Update 'As Text' Definitions
- Window
  - Cascade
  - Arrange Icons
  - Minimize All
- Help
  - Contents
  - Search for Help On
  - How to Use Help
  - About

Software Navigation

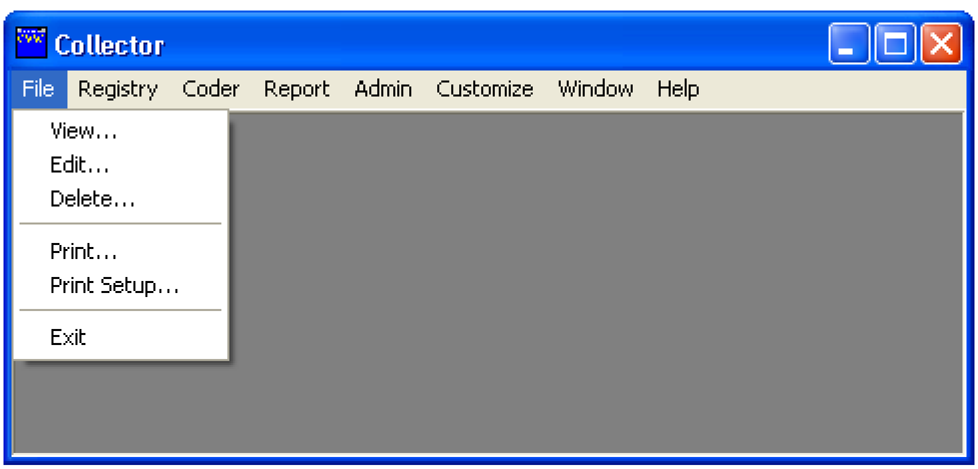
Menus and Functions

The Collector menu system allows access to various features. At the top of the Collector screen, click the desired menu name to view its options.



⇨ *File*

The ***File*** menu allows access to various Collector files and functions.

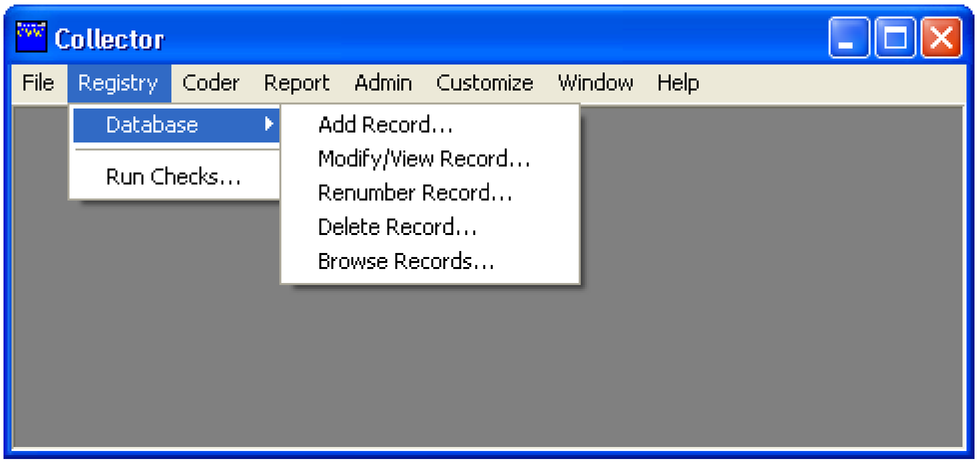


View	Select “View” to open various Collector files, such as “screen.out” files and text files.
Edit	Select “Edit” to open and edit various Collector files, such as “screen.out” files and text files.
Delete	Select “Delete” when you wish to delete a file or patient record from the collector database or directory. You will be prompted to confirm the delete.
Print	Select “Print” to print reports and “.OUT” files displayed in your Collector software.

Print Setup	Select "Print Setup" to specify printer options such as printer selection and paper orientation.
Exit	Click "Exit" to close the software.

⇨ *Registry*

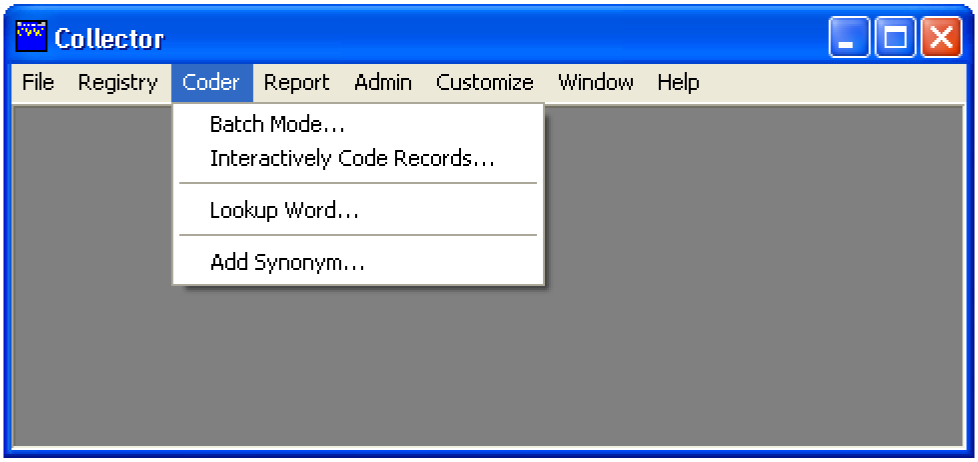
The ***Registry*** menu allows access to patient records entered into your Collector database.



Database	The database menu contains options for adding, modifying, viewing, and deleting Collector records.
Add Record	Select this option to add a new record by hospital index number.
Modify/View Record	Select this option to modify or view a record by hospital index number.
Renumber Record	Choose this option to select and modify the hospital index number for the desired record.
Delete Record	Select this option to delete a record by hospital index number.
Browse Records	Select this option to browse for a group of records.
Run Checks	Click Run Checks to activate the Batch Checks feature. This function allows multiple records to be checked at once and performs record status updates when specified.

➪ *Coder*

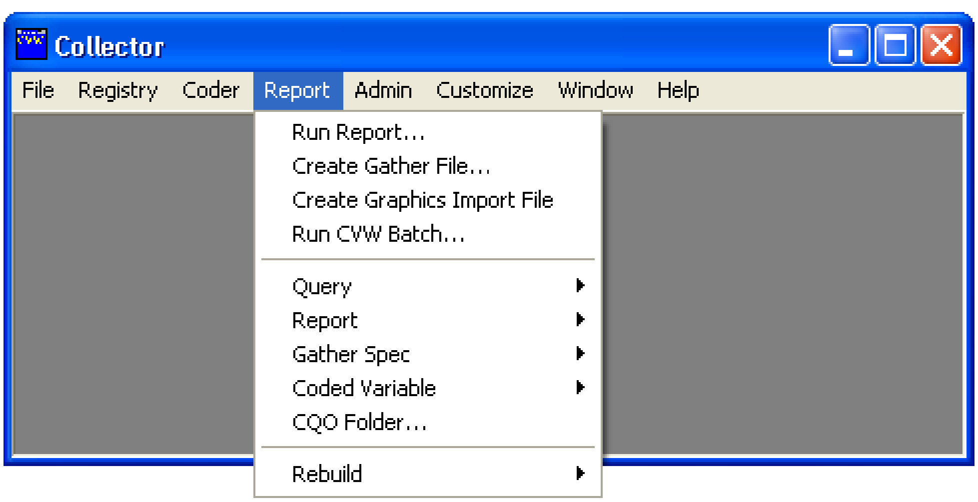
The ***Coder*** menu allows access to Collector's Injury Coding functions.



Batch Mode	Select this option to access the Collector batch coding function. This feature allows coding of a group of records at one time.
Interactively Code Records	Select this option to access the Collector interactive coding functions. This feature allows for coding of individual records within a specified group of records.
Lookup Wizard	Select this option to see if an injury term exists in the Tri-Code dictionary.
Add Synonym	Select this option to add a synonym to the Tri-Code dictionary.

➪ *Report*

The ***Report*** menu allows access to Collector's reporting functions, including built-in and user-defined reports and queries.



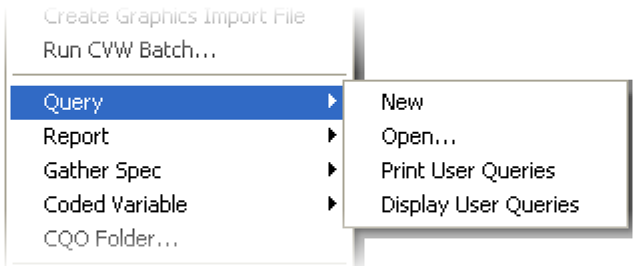
Run Report Select this option to open the "Run Report" screen. From this screen you can choose to run built-in reports, user-defined reports, queries, and gather files.

Create Gather File Select this option to open the "Create Gather File" screen. Here you will be able to choose from a list of user-defined gather specs and queries to create a gather file.

Create Graphics Import File Select this option to open the "Generate Graphics Import File" screen. Here you can convert statistic report outputs into ".csv" format for use in programs such as MS Excel.

Run CVW Batch This option is used at the direction of Technical Support staff to run special reports or technical support functions.

Query



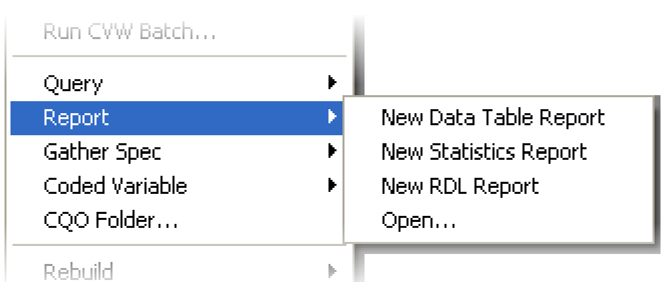
New Select this option to create and save a new query.

Open Select this option to open and modify/view an existing query.

Print User Queries Select this option to print a list of queries in the Collector database. A print-out of each query title and its description will be sent to your default printer.

Display User Queries Select this option to display a list of queries in the Collector database on the screen. You may also save and print this file using the appropriate functions on the *File* menu.

Report



New Data Table Report Select this option to create a new user-defined Data Table report.

New Statistics Report — Select this option to create a new user-defined Statistics report.

New RDL Report — Select this option to create a new user-defined RDL report.

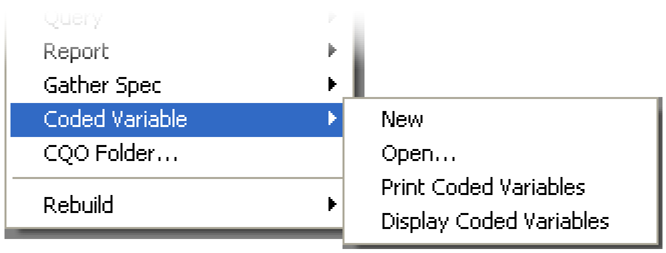
Open — Select this option to view/modify an existing user-defined report.

Gather Spec

New — Select this option to create a new gather specification. Create a gather specification before creating a “Gather File.”

Open — Select this option to open and modify/view an existing gather specification.

Coded Variable



New — Select this option to define and create a new Coded Variable.

Open — Select this option to open and modify/view an existing Coded Variable.

Print Coded Variable — Select this option to print a list of Coded Variables in the Collector database. A print-out of each Coded Variable title and its description will be sent to your default printer.

Display Coded Variables — Select this option to display a list of Coded Variables in the Collector database on the screen. You may also save and print this file using the functions on the *File* menu.

CQO Folder — Select this feature to import or export CQOs (Collector Query Objects) into or out of the Collector database. This feature is normally used at the direction of Technical Support or for special reports/queries.

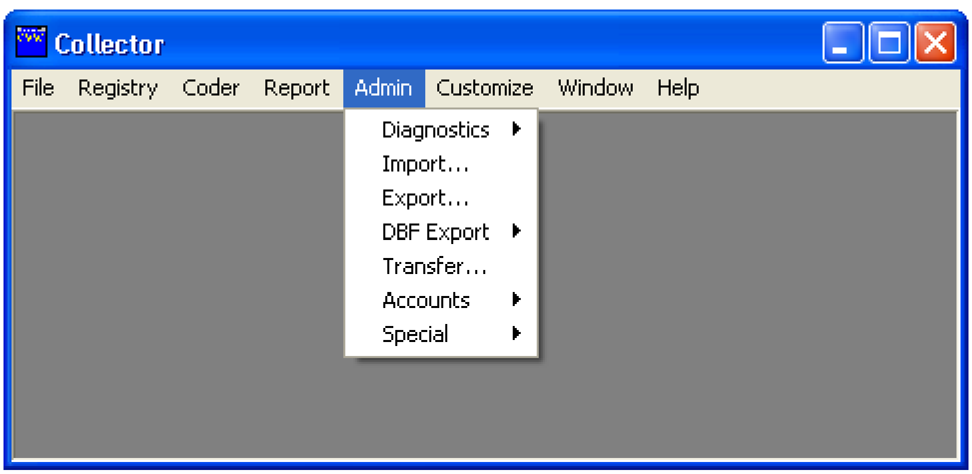
Rebuild

CQO — CQO stands for Collector Query Object. Select this option to rebuild queries and custom data elements. This feature should be used at the direction of Technical Support staff and when specified in Collector update/installation documents.

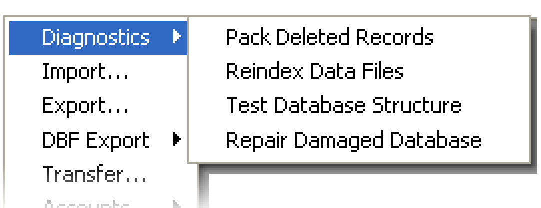
Reports, Queries — Rebuild your Reports and Queries after editing an existing query and/or coded variables that are linked to other queries or reports. This will ensure that edits to queries and coded variables are applied throughout the Collector database.

⇨ *Admin*

The ***Admin*** menu allows access to functions such as data transfer and database diagnostics.



Diagnostics



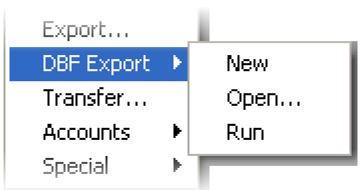
Pack Deleted Records — This feature should only be used at the direction of Technical Support.

Reindex Data Files	Re-index the data files on a daily or weekly basis after testing the database to keep the database in sync. When selected, this feature insures that the database's index matches the correct record on your computer.
Test Database Structure	Test the database structure on a daily or weekly basis to detect any minor damage to the database before it might become serious. If errors are found in your database, contact Technical Support immediately.
Repair Damaged DB	This feature should *ONLY* be used at the direction of Technical Support.

Import Select this option to display the "Import" screen. This feature is commonly used to import data from one Collector installation into another like installation.

Export Select the option to display the "Export" screen. This feature is commonly used to export data from one Collector installation into another like installation.

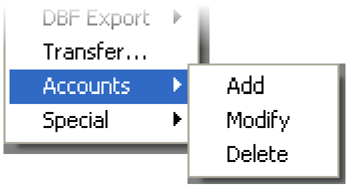
DBF Export DBF Export allows you to export data for selected elements and record subsets in a format usable in programs such as MS Access and Excel.



New	Select this option to specify data elements and patient subsets to be included in a new DBF export file.
Open	Select this option to open an existing DBF export file.
Run	Select this option to create a DBF export file from the Collector database.

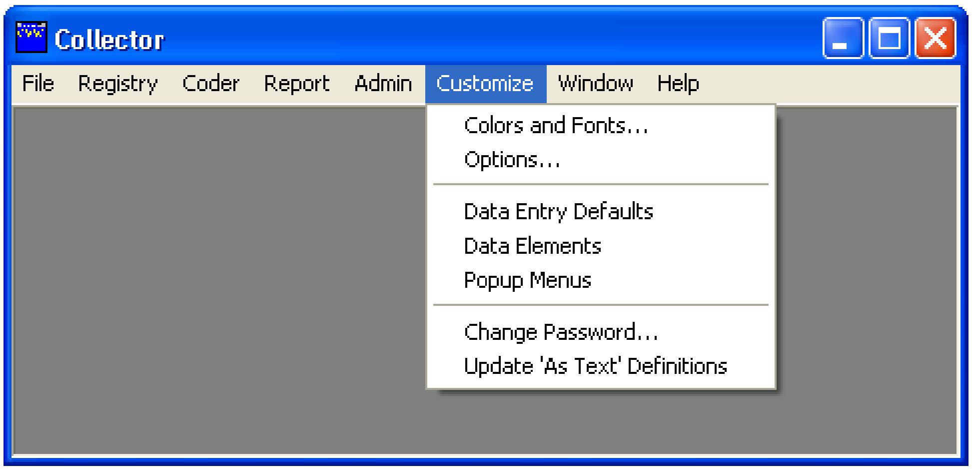
Transfer Select this option to display the "Transfer" screen. This feature will allow you to create files suitable for transfer to a central registry.

Accounts Collector user accounts allow administrators to secure the Collector database and specify the level of access for each Collector user.



Add	Select this option to display the "Add User" screen and create new Collector user accounts.
Modify	Select this feature to edit existing options for Collector user accounts, including changing account passwords.
Delete	This feature will allow you to delete individual Collector user accounts from your database. Before deleting an account, consider changing the account to restrict unauthorized access instead.

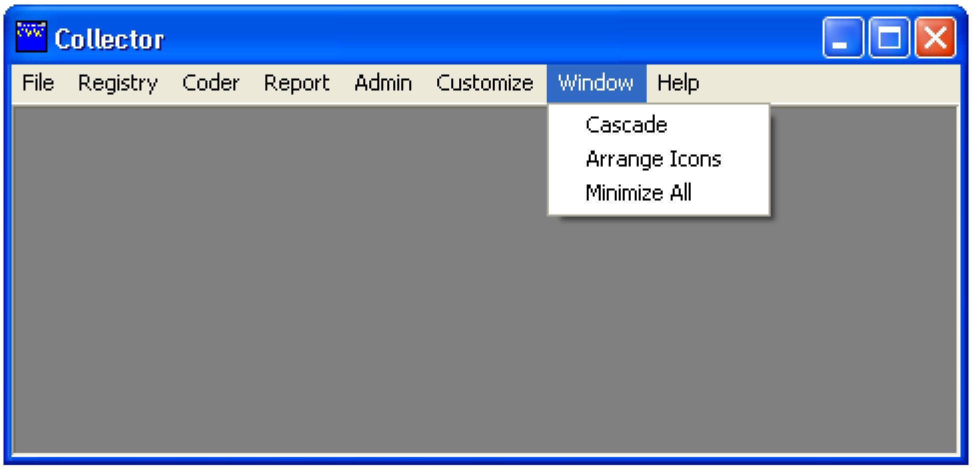
⇨ *Customize*



Colors and Fonts	Select this option to open the "Colors and Font Configuration" screen and edit the look of your Collector software. See the *Customization Features* section of this manual for more information.
Options	Select this option to display the Collector "Options" screen. On this screen you can edit your Facility name (appearing at the top of your Collector reports) as well as other Collector options. See the *Customization Features* section of this manual for more information.
Data Entry Defaults	Default values can be set for most data elements in Collector. Select this option to display the "Data Entry Defaults" screen and specify default values.
Data Elements	If a particular piece of information is not collected in the Collector database, you can create a custom data element to capture the desired information. Select this option to display the "Custom Data Elements" screen and create customized local data elements.
Popup Menus	Select this option to display the "Select Menu" screen where you choose the appropriate menu to edit. Be sure to select "Update 'As Text' Definitions" to apply the popup menu changes.

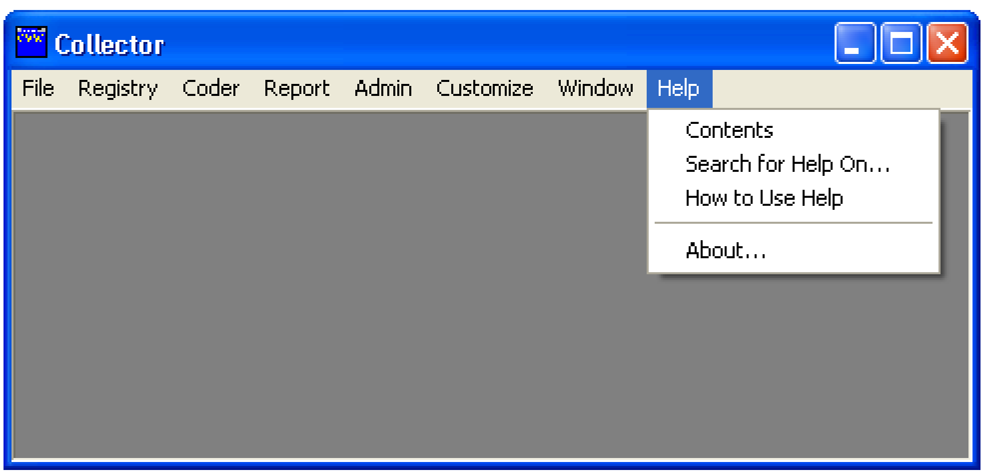
Change Password	Select this option to display the “Change Password” screen; changes will be applied to the account used to log-in to the current Collector session.
Update ‘As Text’ Definitions	Select this option to apply changes made to popup menus, custom data elements, and other customizable features.

⇨ *Window*



Cascade	Select this option to arrange all open windows within Collector.
Arrange Icons	Select this option to arrange icons within Collector.
Minimize All	Select this option to hide all open windows within Collector.

⇨ *Help*

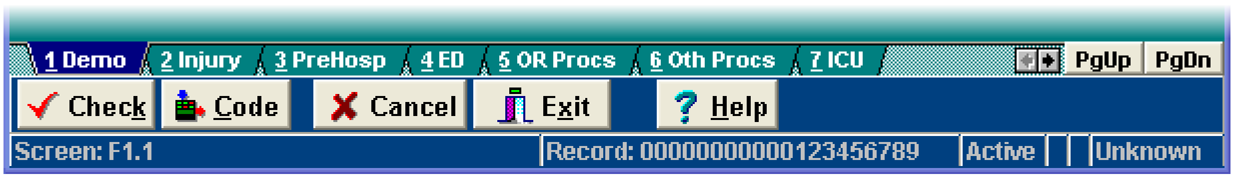


Contents	Select this option to display the main Collector help topic categories and easily navigate to the appropriate section.
Search for Help On	Select this option to search the Collector help files for key topic words and display the associated information.

How to Use Help	Select this option if you are unsure of how to use the Collector Help file features. A helpful guide to Collector Help features will be displayed.
About	Select this option to display general information about you Collector installation.

⇨ *Tabs*

The Collector Data Entry screens are grouped by section tabs. Each tab contains multiple screens that can be accessed by using the [PgUp] and [PgDn] buttons on the screen or your keyboard. The screen name is listed in the lower left corner of the status bar. Click the desired tab to access data entry sections.



⇨ *Keystrokes*

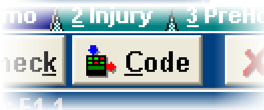
Many Collector functions can be accessed by using keystrokes. Below is a list of keystrokes commonly used during data entry:

[Tab], or [Left Arrow], [Right Arrow]	Moves the cursor to the next field.
[Shift] + [Tab] or [Left Arrow], [Up Arrow]	Moves the cursor back to the previous field.
[Arrow Keys]	Moves the cursor through a field, to the next field or back to the previous field. On a menu, scrolls through menu choices.
[Home]	Moves the cursor to the beginning of a field.
[End]	Moves the cursor to the end of a field.
[Page Up]	Moves the cursor to the previous data entry screen.
[Page Down]	Moves the cursor to the next data entry screen.
[Esc]	Exits the active menu.
[Enter]	Selects an item from a menu.
[Alt] + [M], or [Ctrl] + [Up Arrow]	Displays the menu for the active field if the Auto Popup option has been turned off.
[Ctrl] + [S]	Saves the current record without exiting the record.

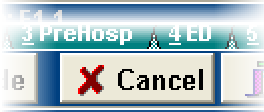
⇨ *Buttons*

Moves to that section in a record.

Moves to the previous or next data entry screen.

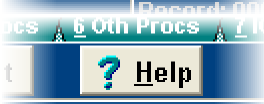


Codes the record using Tri-Code®.

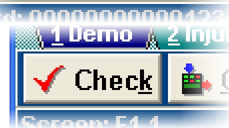


Exits the record with the option to save or discard changes.

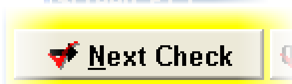
Saves the current record and exits data entry.



Displays the context sensitive On-line Help.



Checks the record for errors and inconsistencies.



Moves to the next check (only displayed while in Check mode).

Overrides the current check (only displayed while in Check mode).

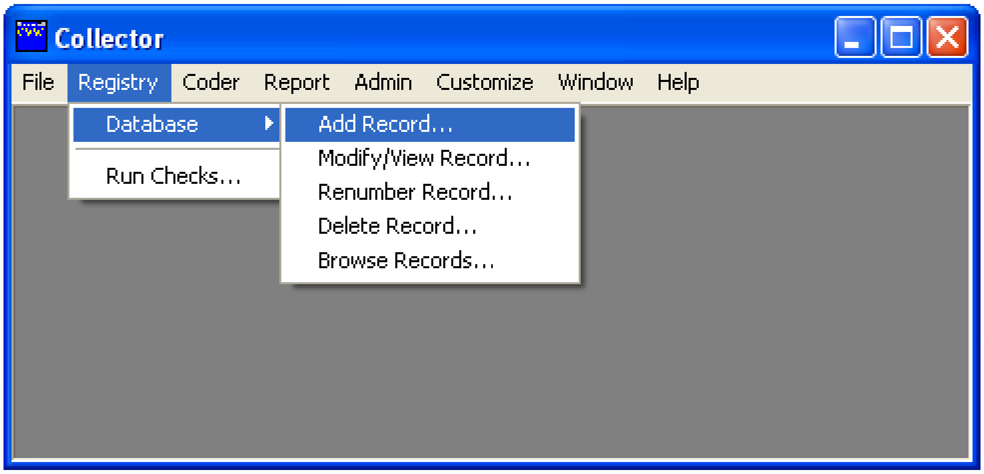
Data Collection

Data Collection

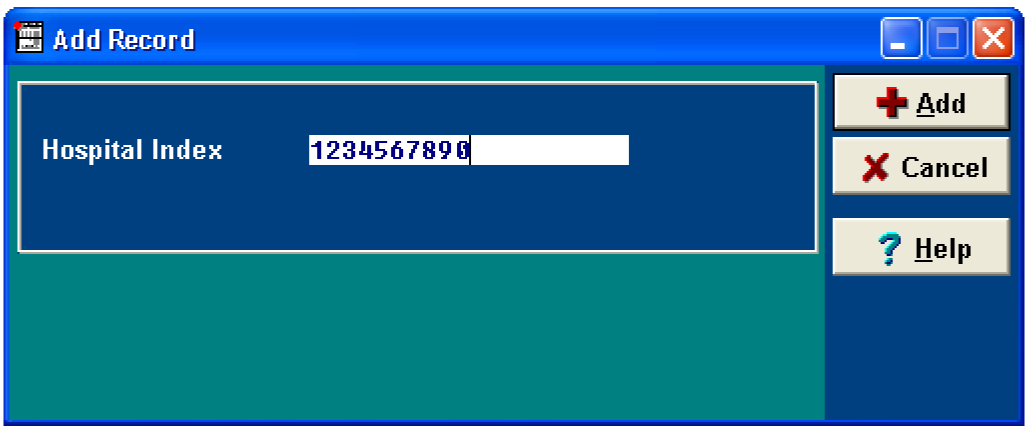
⇨ *Add Record*

Select this option to add a new record by hospital index number.

1. Select “Add Record” from the ***Registry* | *Database*** menu.



2. The “Add Record” screen will appear. Enter the next appropriate hospital index number.

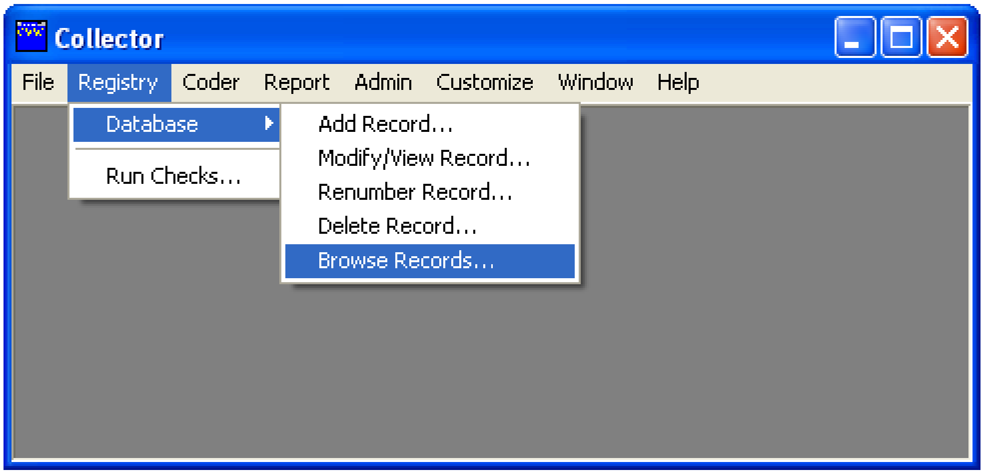


3. Click [Add] to create a new record in the database. The “Data Entry” screen will appear.

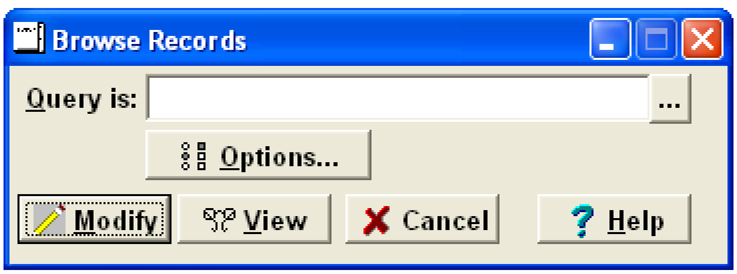
⇨ *Browse Records*

The Browse Records feature allows you to modify or view a specified group of records.

1. Select "Browse Records" from the ***Registry | Database*** menu to modify or view a group of records.



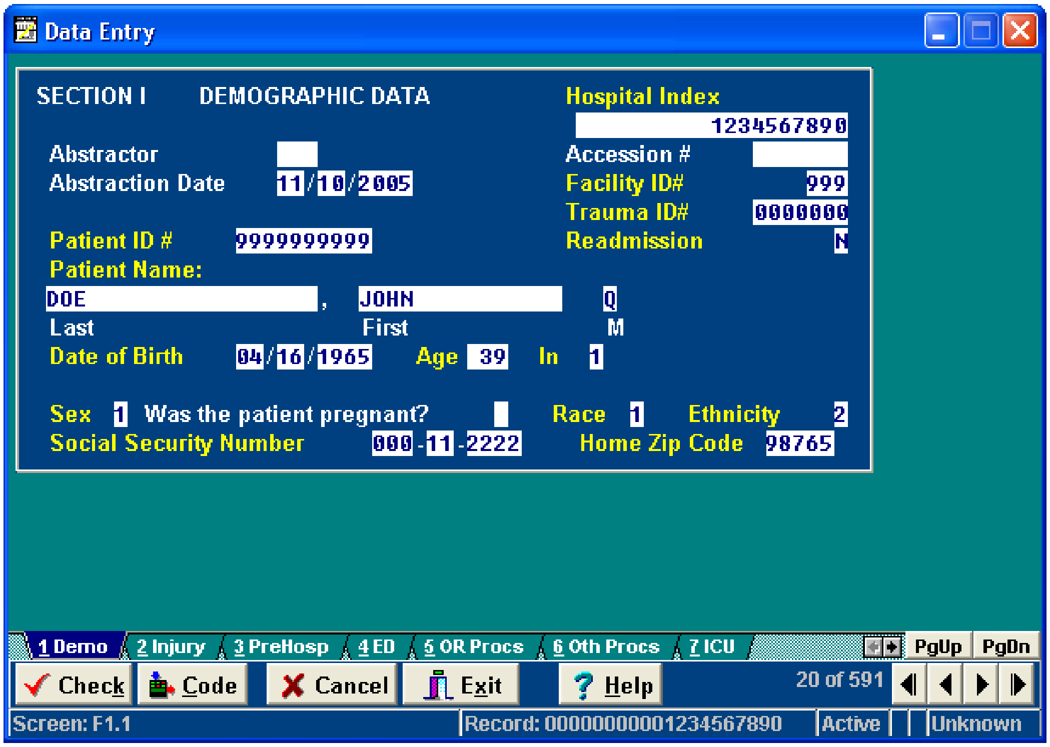
2. The "Browse Records" screen will appear.



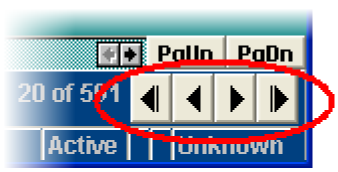
3. You may select a specific subset of patients to modify or view using a query. Click the "Query is" menu button to select a query from a list of saved user-defined queries.

4. The "Specify Records" screen will appear. Select the appropriate options on the screen to further narrow the desired subset of records and click [OK].

5. The "Data Entry" screen will appear displaying your selected group of records.



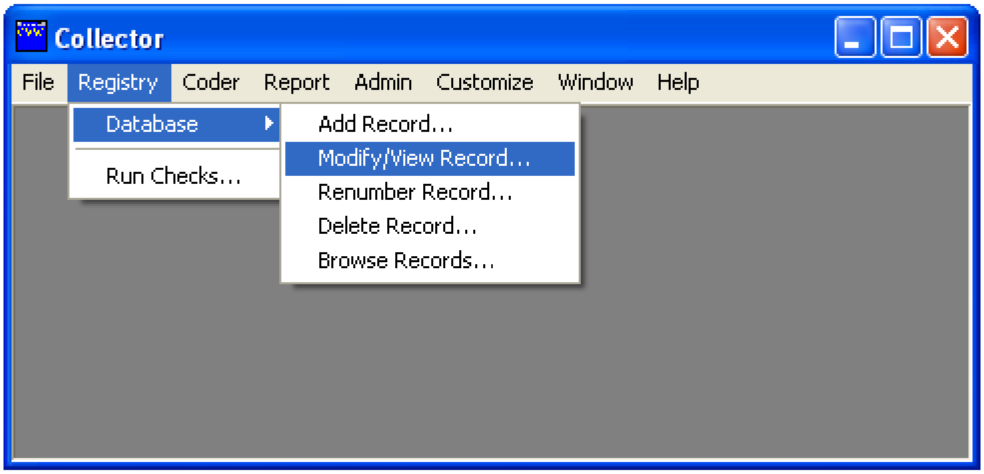
6. Navigate through the group of records using the arrow buttons found on the status bar. In this example, record number 20 out of 591 is selected is currently being displayed.



⇨ *Modify/View Record*

This option allows you to modify or view a record by trauma number.

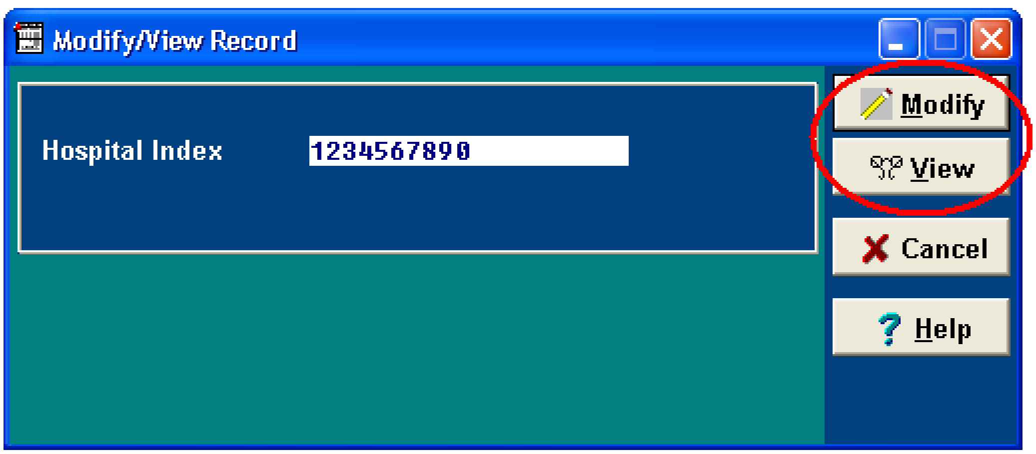
1. Select "Modify/View Record" from the ***Registry | Database*** menu.



2. The "Modify/View Record" screen will appear. Enter the hospital index number for the desired record.

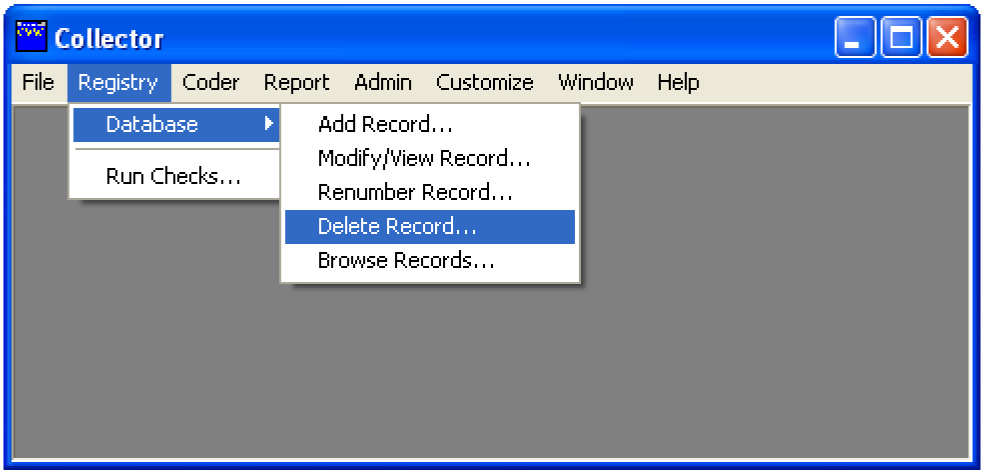
- Click [Modify] to access the record and make changes.

- Click [View] to access the record without making changes

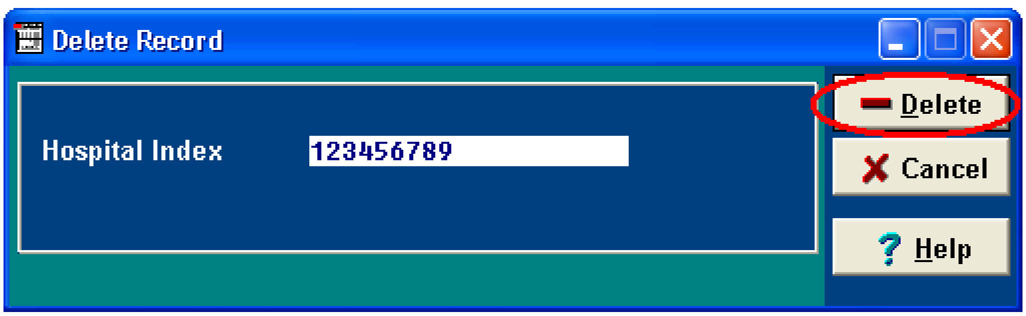


⇨ *Delete Record*

1. Select “Delete Record” from the ***Registry | Database*** menu.



2. The “Delete Record” screen will appear. Enter the hospital index number of the record you wish to delete and click [Delete].



3. The “Confirm” screen will appear. Click [Yes] to delete the record. Click [No] to abort the delete process and keep the record.

Important Note: Use caution when deleting records from your database. Deleted records cannot be recovered except from a backup copy of your database.

Administrative Features

Administrative Features

In this section you will find detailed instructions for the use of Collector's administrative level features. These features are designed to maintain the health and security of you database.

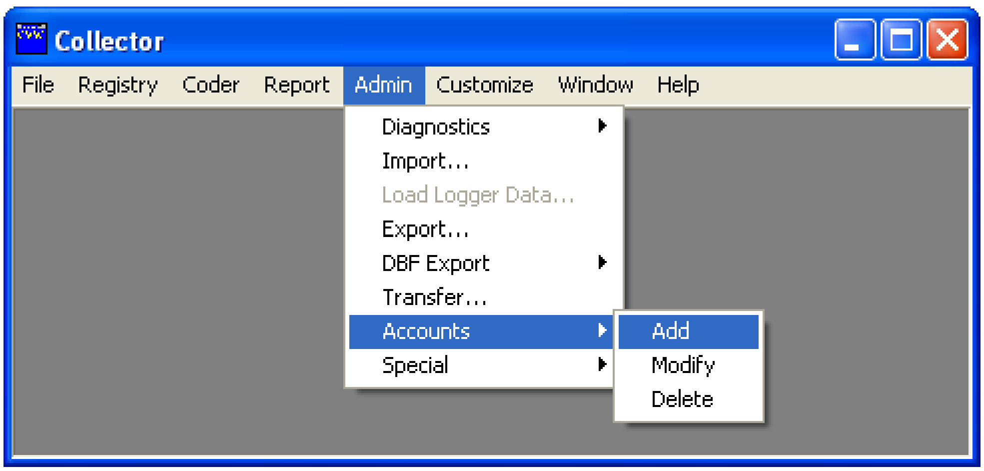
User Accounts

Each person requiring access to data stored in your Collector database should be assigned a User Account. Follow the instructions below to create a new user account.

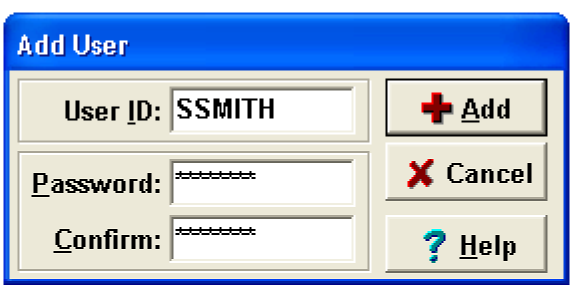
⇨ *Adding an Account*

Note: The default user account (COLLECT, password) should be replaced with a personal account. Each data collector and abstractor should create a unique user account. This will enable security for your Collector database.

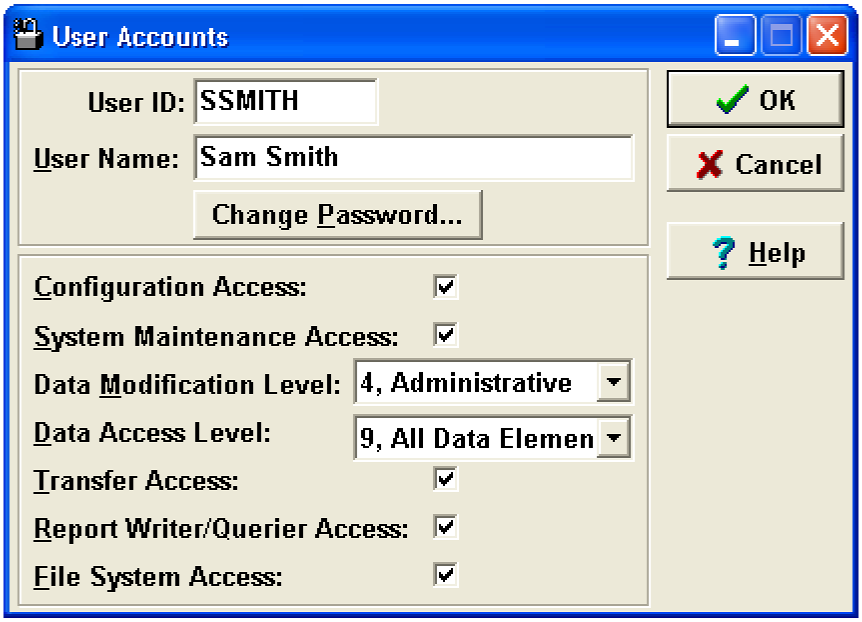
1. To create a new user account, select "Accounts | Add" from the ***Admin*** menu.



2. The "Add User" screen will appear. Enter the desired User ID and password. Passwords should be a mix of upper and lowercase letters and numbers for increased security. Click [Add] to create your new account.



3. The "User Accounts" screen will appear. Here you can configure the data access rights for the new account. Enter the account holder's full name for administrative purposes. Select the appropriate options for the new account.



[Change Password]	Click the change password button to edit the account login password.
Configuration Access	Enabling Configuration Access allows the account holder to edit pop-up menus, add new data elements, and set data entry defaults. Click the checkbox to enable Configuration Access.
System Maintenance Access	Enabling System Maintenance Access allows the account holder to setup, delete, and modify user accounts. Click the checkbox to enable System Maintenance Access. *Note: At least one account must have this access enabled.*
Data Modification Level	Set the appropriate modification level by selecting a choice from the drop down list:
1, View only	When selected, will allow an account view only access to the database. Accounts at this level cannot modify records in any way.
2, Interactive	When selected, will allow an account to add/modify records one at a time. Accounts at this level do not have access to record renumber/delete or batch processes.
3, Batch	When selected, will allow an account to add/modify multiple records one at a time, delete records, batch processes, and coding.

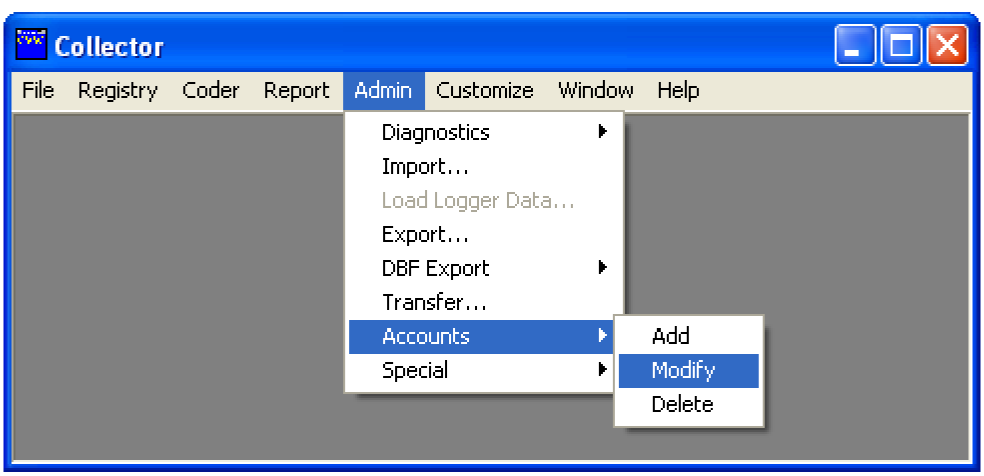
4, Administrative	When selected, will allow an account to access all functions including database diagnostics, import/export, and DBF export.
Data Access Level	This feature allows data access to be restricted to a specified subset/group of elements in the database. This feature is not commonly used in most Collector registries. Select the appropriate access level from the drop down list:
9, All Data Elements	Allows access to all data elements in your database.
8, Restricted Access	Allows access to a specified subset/group of data elements in your database.
Transfer Access	Click the check box to enable the account holder to transfer data.
Report Writer/Querier Access	When selected, allows the use of built-in reports, write/run user-defined queries, reports, and gather files. Click the checkbox to enable "Report Writer/Query Writing Access."
File System Access	When selected allows access to ***File*** menu functions "View", "Edit", "Delete", and allows report output to be sent to the printer or a file.

4. Click [OK] to close the screen and save your account access choices.

   Note: Account access level descriptions are also available by clicking [Help] from the "User Accounts" screen.

⇨ *Modifying an Account*

1. To modify an existing account, select "Accounts | Modify" from the ***Admin*** menu.



2. The "Modify User" screen will appear. Select the User ID of the account you wish you modify from the drop down menu. Click [Modify].

3. The "User Account" screen will appear. All options on the "User Accounts" screen can be modified.

   Note: To change the account password, click [Change Password] from the "User Accounts" screen.

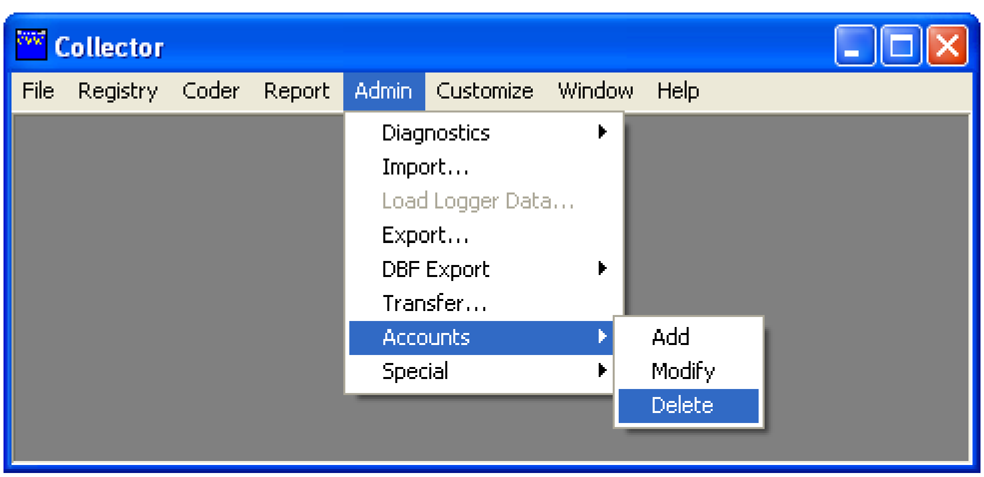
- *The "Change Password" screen will appear.*

- *Enter a new password and repeat it in the "Confirm New Password" field.*

- *Click [OK] to change the password, and return to the "User Accounts" screen.*

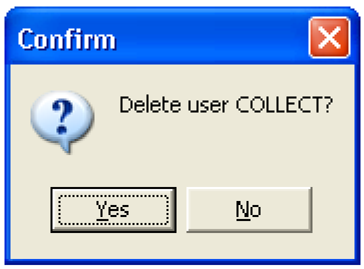
⇨ *Deleting and Account*

1. To delete and existing account, select "Accounts | Delete" from the ***Admin*** menu.



2. The “Delete User” window will appear. Select the User ID of the account you wish to delete from the drop down menu. Click [Delete].

3. The “Confirm” screen will appear. Click [Yes] to delete the account. Click [No] to save the account and return to the “Delete User” screen.



Note: Delete the default COLLECT account as soon as you have setup and tested all accounts. Before deleting the default account, make sure that at least one account has “System Maintenance” access. Once an account has been deleted, you cannot restore it unless the “SYS” directory has been backed up.

Database Diagnostics

Collector database diagnostics allow you to detect and prevent problems with your database.

Regular Maintenance

Testing the Database	Test the database for corruption on a daily basis.

Technical Support Tools

Re-indexing the Data Files	This function re-indexes the records in the database and makes sure that the unique patient ID assigned to each record is matched with the correct record in the database file. A new index is assigned to each record or file in the database. It is recommended that you select this menu option when you receive an ‘Index File Out of Sync’ error message or after testing, repairing, and/or packing the database.
Pack Deleted Records	Only use this feature with the direction of Technical Support.
Repair Damaged Database Files	Only use this feature with the direction of Technical Support.

Backing Up Your Data

⇨ *The Importance of Backing Up Collector*

The Collector database should be backed up on a daily (or at least weekly) basis. If anything should happen to your computer or the network the database is on, you may need to restore your data from a backup. Without a reliable backup, you may lose data permanently. If your Information Systems (IS) department is going to backup the data, make sure they know which files to back up.

⇨ *Which Files to Include in the Backup*

If you have enough space on your backup medium, include the entire software folder (default is “CollectW”). If space is limited, back up the CDB, SYS, and USR folders found in the Collector directory. The CDB folder contains the Collector database, the SYS folder contains menus, custom fields, and user account information, and the USR folder contains user reports and queries.

⇨ *Backup Tips*

Before making a backup of Collector, run the database diagnostics. If anything other than “Database is OK” comes up, contact Technical Support for assistance. Prior to beginning the backup process, be sure all users are logged out of the system. Also, you should not overwrite your backup each night, in case there is a problem with the database that is not recognized immediately or a problem with the backup media. It is good to have 5 separate backup tapes/disks, one for each weekday.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
SUN	MON	TUE	WED	THU	FRI	WEEK1
SUN	MON	TUE	WED	THU	FRI	WEEK2
SUN	MON	TUE	WED	THU	FRI	WEEK3
SUN	MON	TUE	WED	THU	FRI	PERIOD1
SUN	MON	TUE	WED	THU	FRI	WEEK1
SUN	MON	TUE	WED	THU	FRI	WEEK2
SUN	MON	TUE	WED	THU	FRI	WEEK3
SUN	MON	TUE	WED	THU	FRI	PERIOD2

!! *Tip: The Daily backups (SUN – FRI) are kept until the following week.*

!! *Tip: The Saturday backups (WEEK1 – WEEK3) are kept until the following period.*

!! *Tip: The End-of-Period backups are kept for a minimum of 1 year.*

!! *Tip: In some cases, it may be desirable to retain the period backups indefinitely or to keep PERIOD13 as a permanent year-end archive.*

The above table is the extreme case. If Collector is not used on any given day, a backup is not necessary. Simply back up each day you use Collector and keep WEEK and PERIOD backups to protect your data.

⇨ *Backup for Collector Network Installation*

If Collector is installed on the network, verify with the IS department that Collector is included in frequent backups.

Important Note: Please DO NOT rely on IS Department backups to safeguard your data. While it is good that the IS Department backups are made, it has been our experience that some IS Departments do NOT keep backups over 30 days (1 week in some cases). Occasionally, it becomes necessary to reference a backup from as far back as 1 year.

⇨ *Backup for Collector Local Computer Installation*

If Collector is on a local drive and moving Collector to a network location is not desired, Collector will have to be backed up locally. Check with your IS department to see what backup method they recommend. Below are some backup options to be considered:

- A Zip drive or tape drive is the best way to back up the database, if stored locally. Consult the IS department on availability of equipment and instructions on use.

- Using a CD writer is another excellent way to back up the database. Again, consult the IS department on availability of equipment and instructions on use.

- WinZip or PKZip is a utility for compressing files on floppy disks. If WinZip is not installed on the local PC, consult IS about WinZip. WinZip takes considerably more time than a zip drive, tape drive, or CD writer and may require numerous diskettes depending on the number of records.

- Windows backup is another way to store a backup on floppy disks. Like WinZip, Windows Backup takes considerably more time than a zip drive, tape drive, or CD writer and takes many disks.

If Collector is stored locally and moving Collector to the network is desired, the IS department can move the contents of the main Collector folder (default is CollectW) to a network drive. The shortcuts will need to be redirected to the new location. The database may run slower due to being run across the network.

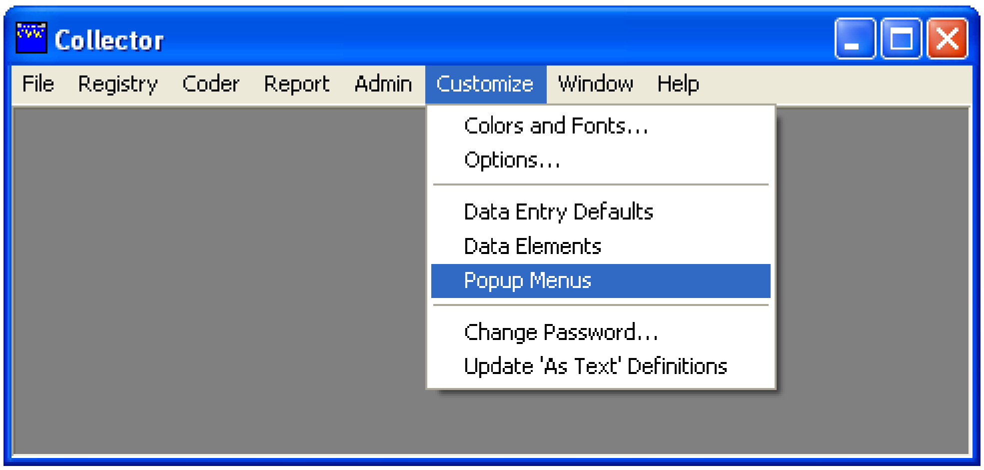
Customization Features

Customization Features

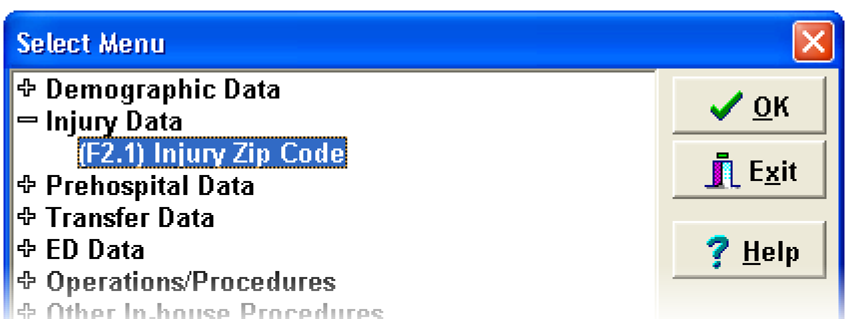
Popup Menus

Menus may be structured as follows: "choice, description." Characters appearing before the comma (choice) are recorded in the database when items are selected from the menu. Characters appearing after the comma are used for description purposes only and are displayed in the report output as descriptions (not recorded in the database). When adding a new menu option to a menu, typically you will insert the option at the end of the menu and use the next available number.

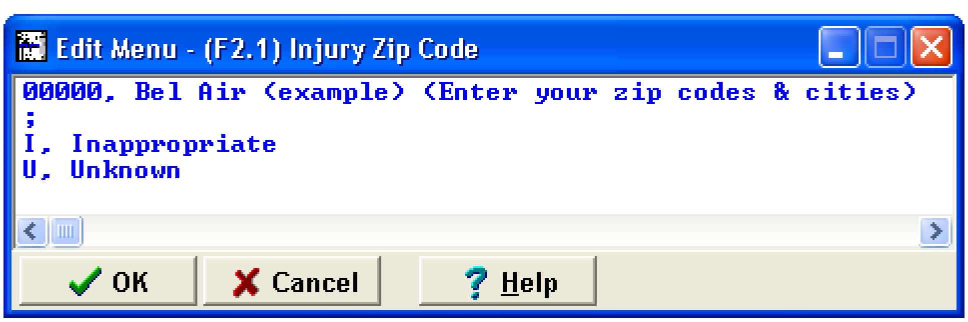
1. Select "Popup Menus" from the ***Customize*** menu.



2. The "Select Menu" screen will appear. Double click the menu category to expand a list of editable menus. Highlight the menu you wish to edit and click [OK].



3. The "Edit Menu" screen will appear for the selected menu.



4. Instructions and an example for adding choices to the menu will appear at the top of the "Edit Menu" screen.

Formatting Tips

!! Never create blank lines on the "Edit Menu" screen. Use a ";" semicolon to create a 'blank line' in the menu.

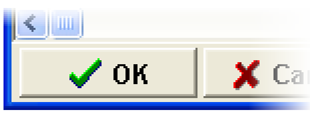
Example

Zip Code Menu**;** **;** 98104, Seattle 98501, Olympia

In the example above a ";" semicolon has been placed after the menu title. Putting a ";" as the last character in a line will allow characters on the same lines as the semi-colon to appear on the popup menu, but will prevent them from becoming a selectable choice.

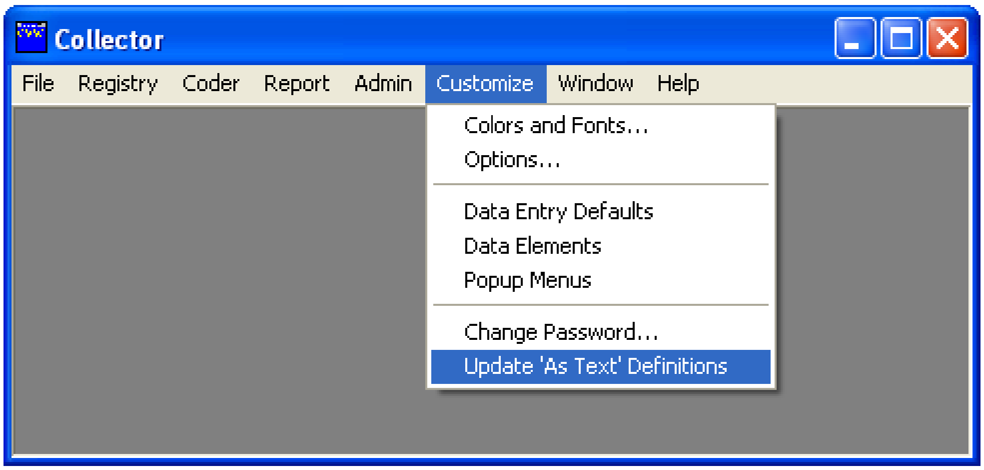
5. Add choices to the menu following the format in the example at the top of the "Edit Menu" screen.

6. Click [OK] to save the changes and close the "Edit Menu" screen.

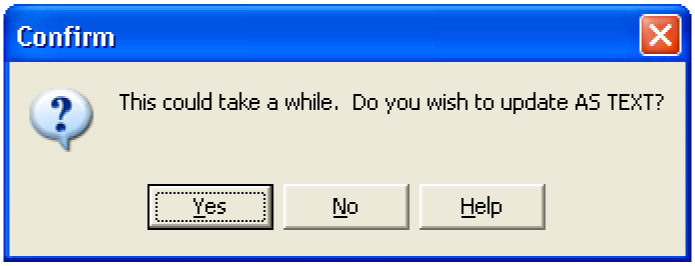


7. Click [Exit] to close the "Select Menu" screen.

8. Select "Update 'As Text' Definitions" from the ***Customize*** menu.



9. The “Confirm” screen will appear, click [OK] to update AS TEXT. This process will apply the changes you have made in the menu editor(s) to your database.



10. Click [Yes] to update the AS TEXT definitions.

    Important Note: Never change or delete existing menu options.

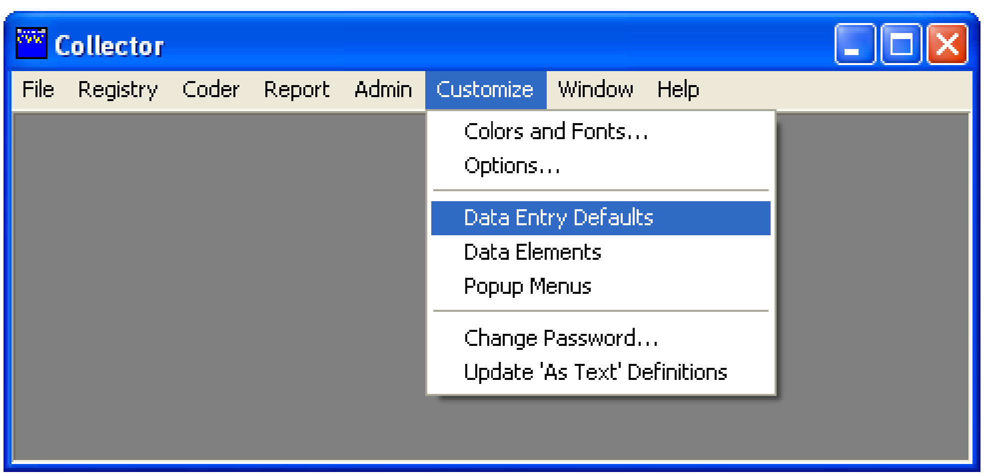
    Important Note: Do not alter the definitions/numbers of the existing choices. Doing so will create inconsistent data in your database.

    Important Note: Remember to update ‘As Text’ definitions after editing a popup menu.

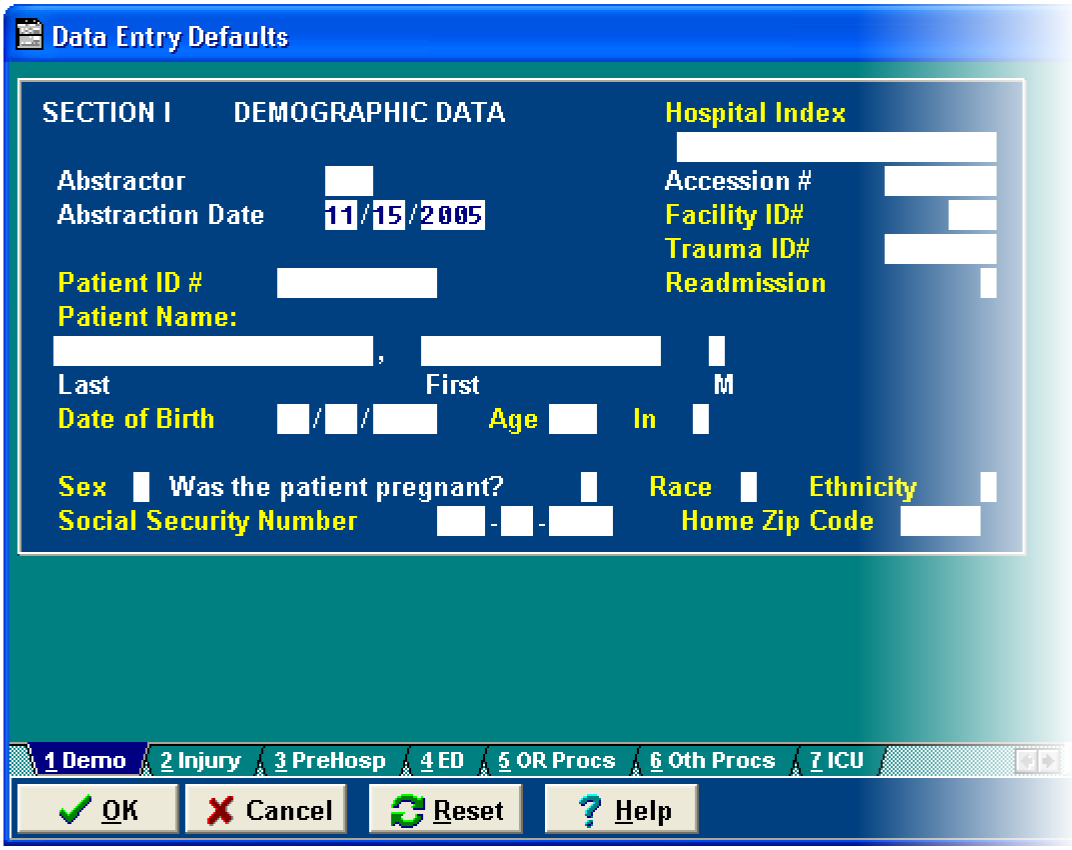
Data Entry Defaults

Sometimes it is useful to have certain data entry fields default to a particular value each time a new record is entered. For example, for records entered in 2005, you could set the data entry default for the year of all date fields to 2005. Defaulted data appearing in a new record can be modified while entering data if necessary.

1. Select “Data Entry Defaults” from the ***Customize*** menu.



2. The “Data Entry Defaults” screen will appear. This screen contains all of the data elements and screens found in the data entry section. Most data elements can be defaulted.



3. Enter the default values for the desired data elements.

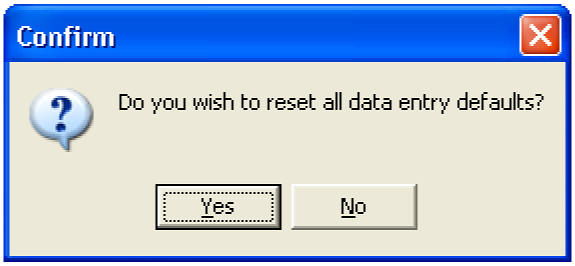
4. Click [OK] to save your data defaults and close the “Data Entry Defaults” screen.

   Note: Default data will only appear when adding a new record to your database; existing records are not affected by defaulted data.

Reset Data Entry Defaults

1. Click [Reset] to erase all data entry defaults.

2. The “Confirm” screen will appear. Click [Yes] to reset the data entry defaults. Click [No] to abort the reset process and retain the current data entry defaults.

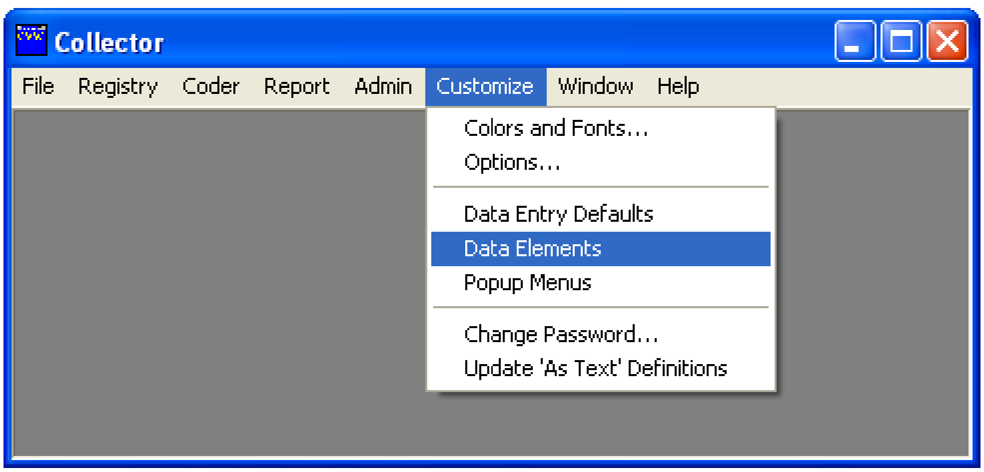


3. Click [OK] to save the selections and close the “Data Entry Defaults” screen.

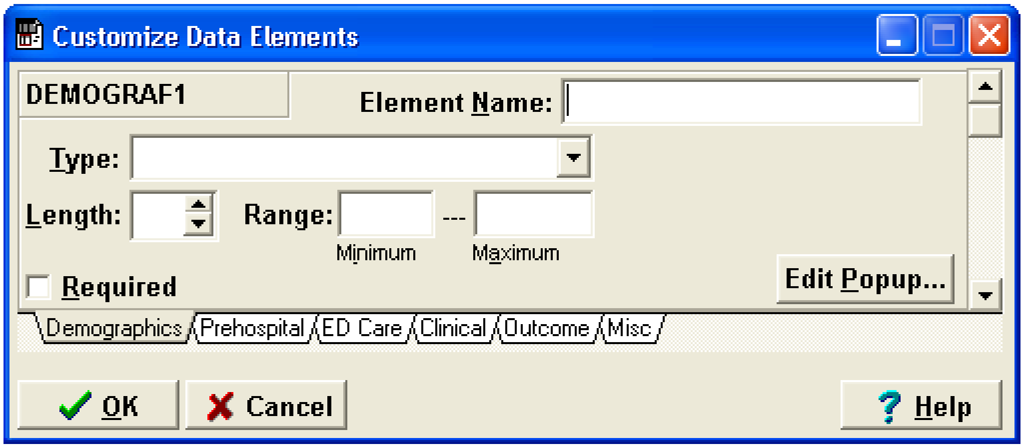
Adding Custom Data Elements

Data elements not collected in your existing database can be added using the “Customize | Data Elements” feature. Custom data elements appear at the end of major data entry tabs.

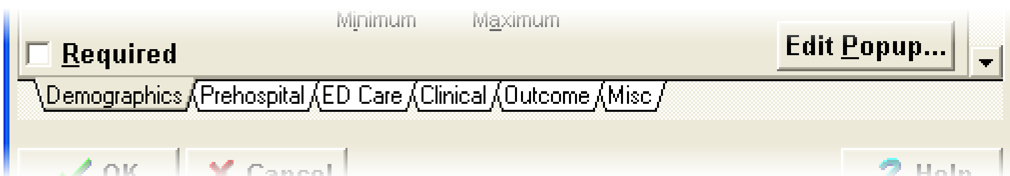
1. Select “Data Elements” from the ***Customize*** menu.



2. The “Customize Data Elements” screen will appear.

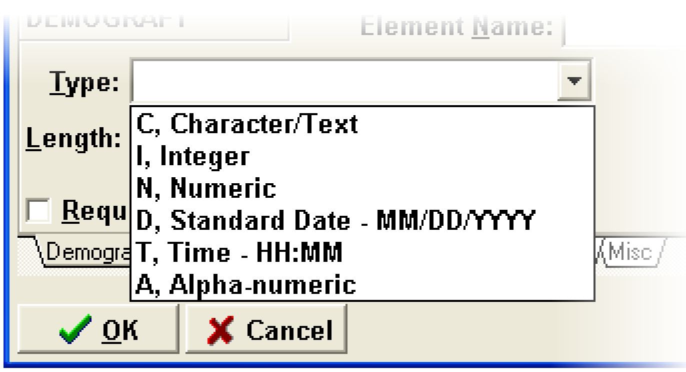


3. Choose the tab for the section in which to include your custom element.



4. Enter a name for your custom element in the “Element Name” field.

5. Click the “Type” drop-down arrow and select an element type from the menu.



C, Character/Text	Select this format if the data element will contain letters, numbers, punctuation, and/or spaces.
I, Integer	Select this format if the data element will contain integer values (numeric) including, positive or negative whole numbers.
N, Numeric	Select this format if the data element will contain numeric values with a decimal point.
D, Standard Date	Select this format if the data element will contain a standard date style (Month/Day/Year).

T, Time Select this format if the data element will contain a time (24 hour time format).

A, Alpha-numeric Select this formal if the data element will contain letters and numbers.

6. Specify the maximum number of characters for the element in the “Length” field when creating the following element types:

   Note: Specify the field length (# of characters) of the ***choice*** *on the menu, not its associated descriptive text.*

   - C, Character
   - I, Integer
   - N, Numeric
   - A, Alpha-numeric

7. Select a minimum and maximum range when creating the following element types:

   - I, Integer
   - N, Numeric

8. Click the “Required” checkbox to include the element in the data checks process. The element will be checked for completeness before a record can be closed.

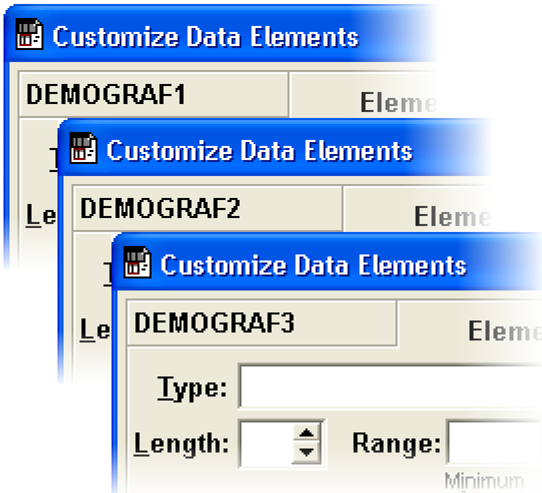
9. Click the [Edit Popup] button to create a popup menu for your element. See the *Customization Features/Popup Menus* section of this manual for step by step instructions.

   Important Note: The creation of a popup menu is required for all custom data elements, even if data will not be selected from a menu. The popup menu will display the title and instructions for a custom data element.

10. The “Edit Menu” screen will appear. Enter a title for your custom element at the top of the menu. Be sure to enter a “;” semicolon at the beginning of the line to prevent the title from becoming a selectable item on the menu. Add other menu choices as needed. Please refer to the *Customization Features/Popup Menus* section of this manual for additional instructions.

11. Click [OK] to save changes to the popup menu and exit the “Edit Menu” screen.

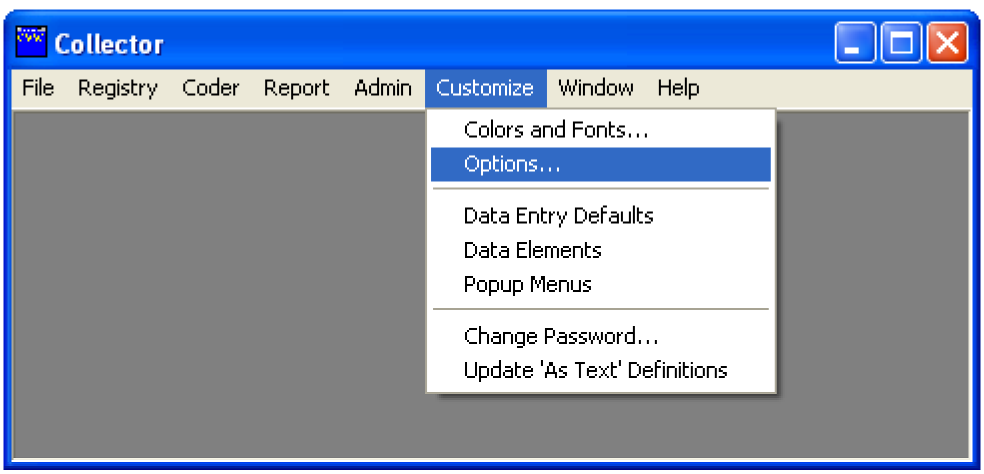
12. Click [OK] to save your changes and exit the "Customize Data Elements" screen or click the scroll arrows at the right side of the screen to create additional elements for your selected tab. Notice the element name change in the upper left corner of the "Customize Data Elements" screen as you scroll down.



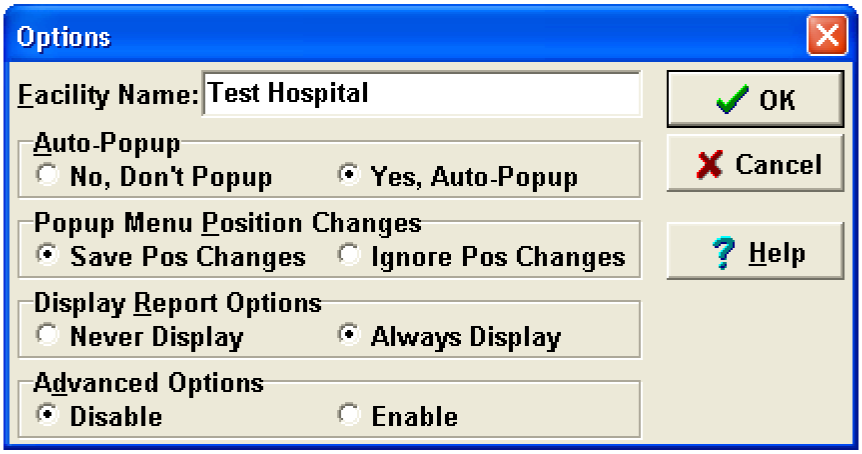
Options

Other Collector customization options can be found on the "Options" screen.

1. Select "Options" from the Customization menu.



2. The “Options” screen will appear.



Facility Name	Enter your official facility name in the “Facility Name” field, this appears at the top of your reports.
Popup Menu Options	Turn on/off auto popup functions. When this option is enabled, the software will automatically display menu choices for associated data elements. Popup menus can be accessed using [Alt] + [M] when this option is disabled.
Position Changes	This function allows you to choose when to remember or ignore menu position changes. Selecting “Ignore Pos Changes” will cause popup windows to return to their previously saved or default location upon exiting the software.

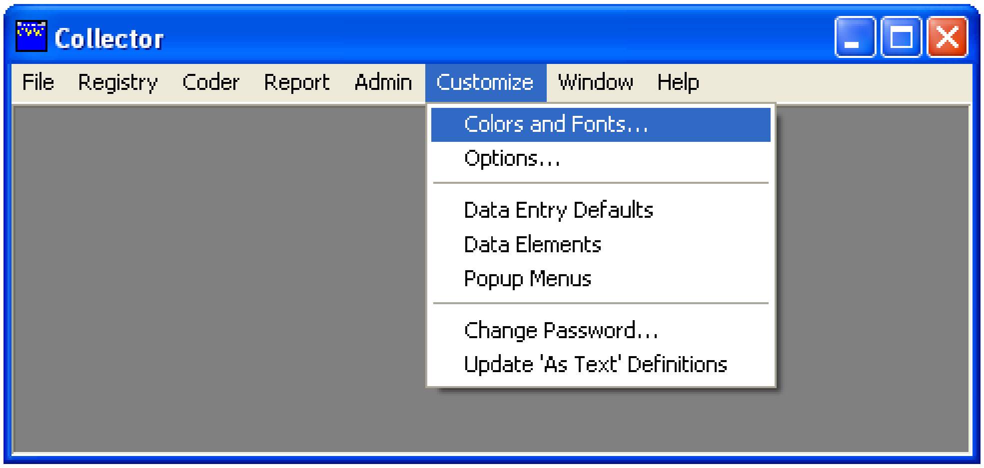
Note: Once you have placed your popup menus during data entry, close the software with “Save Pos Changes” selected. Re-start the software and from the options screen select “Ignore Pos Changes.” Now, each time you restart the software, your custom menu positions will be remembered.

Display Report Options	This function allows you to turn the report options screen on or off. Select whether or not to automatically display report options (Specify Records Screen) when running reports or browsing files. It is recommended to leave this option on.
Advanced Options	This function is reserved for future functionality.

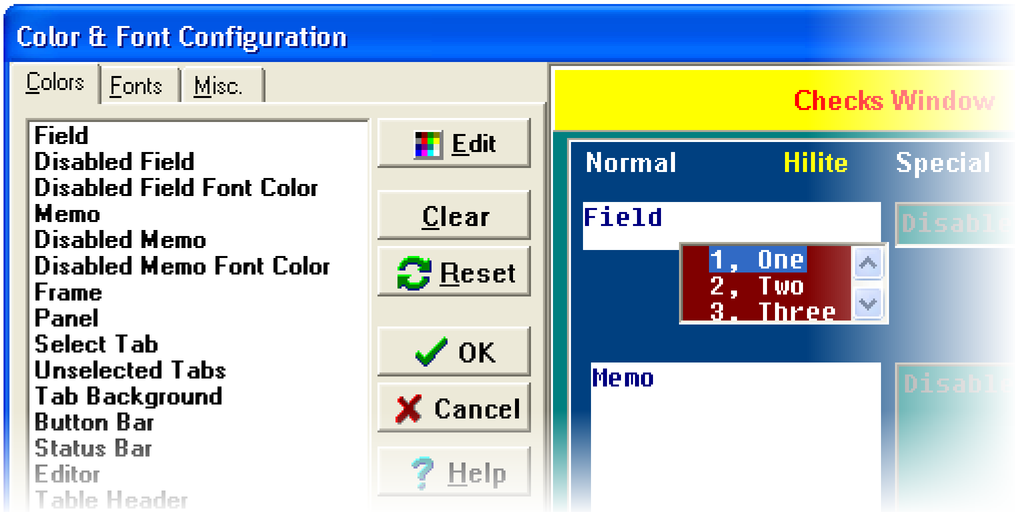
3. Click [OK] to save your selections and close the “Options” menu.

Changing Colors and Fonts

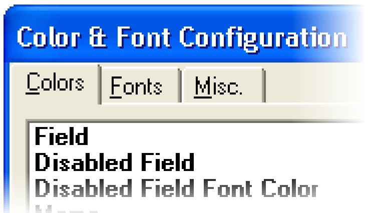
1. To customize the look of your Collector screens select “Colors and Fonts” from the Customize menu.



2. The “Color and Font Configuration” screen will appear.



3. There are three tabs on the “Color and Font Configuration” screen: “Colors”, “Fonts”, and “Misc.”



4. For each tab, highlight the desired software component to modify and click [Edit] to make changes. Your changes will appear in the example display to the right.

- Select the [Clear] button to revert back to the last saved scheme.

- Click [Reset] to revert back to the Collector default scheme.

- Click [OK] to save your changes and close the “Color and Font Configuration” screen.

5. Click [OK] to save your changes and close the “Color and Font Configuration” screen.

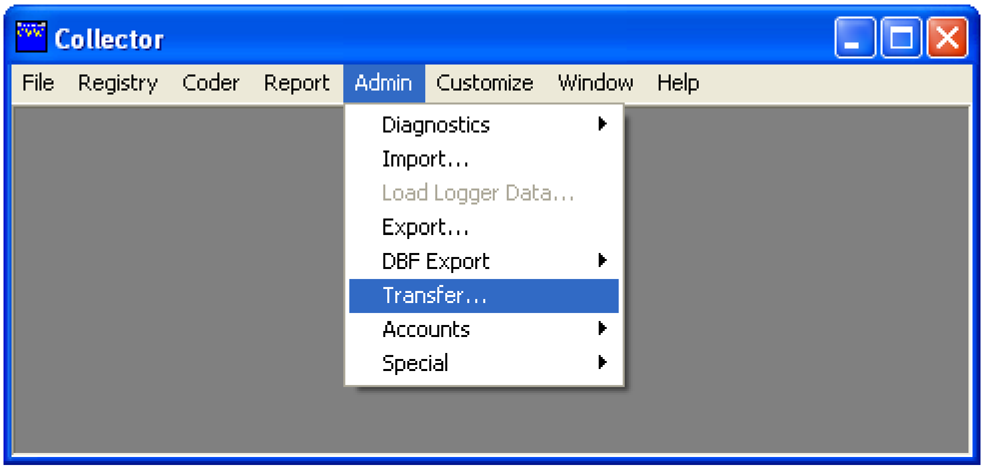
   Important Note: Selecting a large font size may cause the letters to be too big for their location on the screen. The text may appear to be cut off or may not be visible at all. If this occurs, select a smaller font size or adjust the height/width and offset values.

Appendix
Data Transfer

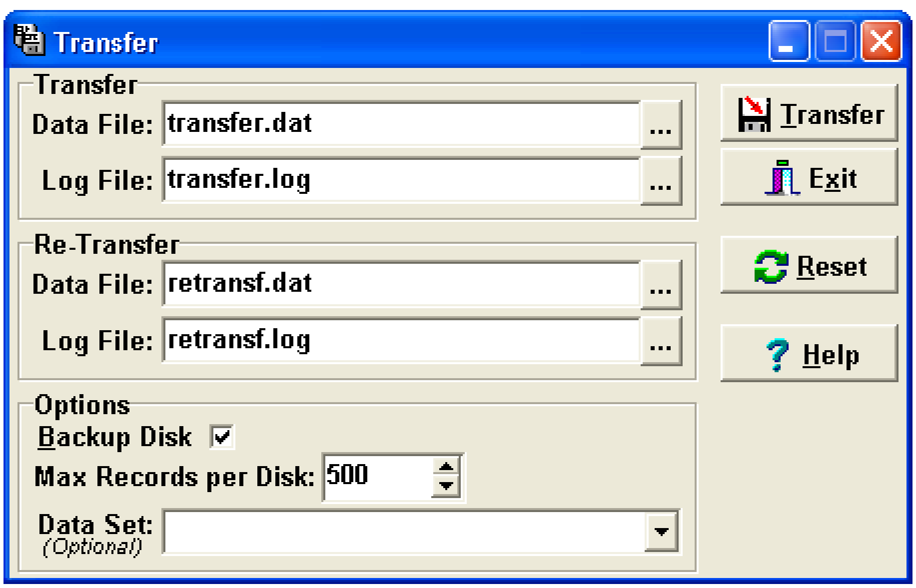
Data Transfer

The Collector Transfer function generates data files which can be sent to a central site. Only closed records are included in the data file. Previously sent records which have been modified and re-closed are included as re-transfers. Your transfer data set has been specified by your system administrator(s) and only data specified in the transfer data set will be included in the transfer file.

1. To create a transfer file, select “Transfer” from the ***Admin*** menu.



2. The “Transfer” screen will appear.



3. Click the “Data File” and “Log File” menu buttons to define the storage locations for each.

   Important Note: Make sure the storage location (the location where the files are saved) is the same for each file.

- *Transfer Data File*
  The transfer data file contains data from closed records that have not been previously transferred.

- *Transfer Log File*
  The transfer log file contains a list of records included in the transfer data file as transfers and the date the file was created.

- *Re-Transfer Data File*
  The re-transfer data file contains data from previously transferred records that have been modified and re-closed since the creation of the last transfer file.

- *Re-Transfer Log*
  The re-transfer log file contains a list of records included in the transfer process as re-transfers and the date the file was created.

  Note: Records included in the transfer file are marked as such and will not be included again unless they are modified and re-closed.

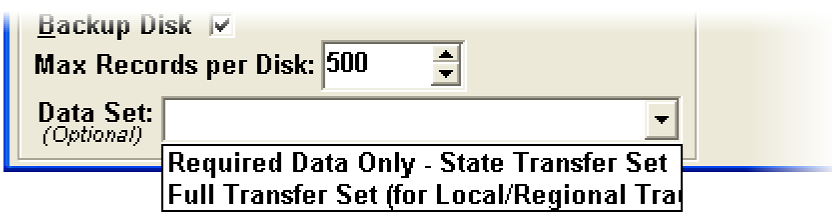
  Note: User-defined fields are not included in the transfer file.

4. Click the “Backup Disk” checkbox to specify the creation of a backup disk when transferring information by floppy disk.

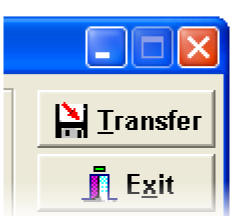
   Note: When sending a transfer file to a hard disk, a backup disk will not be created.

5. Specify the “Max Records per Disk” when transferring information to a floppy disk. If you transfer more records than the max records per disk specified, you will be prompted to insert a second disk when the first disk has reached the max number of records during the creation of your transfer file(s).

6. Click the “Data Set” drop down arrow and select the appropriate transfer data set.



7. Click [Transfer] to generate the transfer file.



8. The transfer confirmation window will appear. Click [OK] after taking note of the number of records transferred and re-transferred.

9. Verify that the following files generated during the transfer process are sent to the central site.

“transfer.dat”	Data for first-time transfers.
“transfer.log”	Log for first-time transfers.
“retransf.dat”	Data for re-transfers.
“retransf.log”	Log for re-transfers.
“id_mod.log”	List of re-numbered and/or deleted records since the last transfer.
“transfer.imp”	Import format specifications file (Required Data Set).
“txfull.imp”	Import forma specifications file (Full Transfer Set).
“Disk0001.id”	Transfer disk sequence identifier.

Important Note: There will either be a “transfer.imp” OR a “txfull.imp”. Both will _not_ *be created during a transfer.*

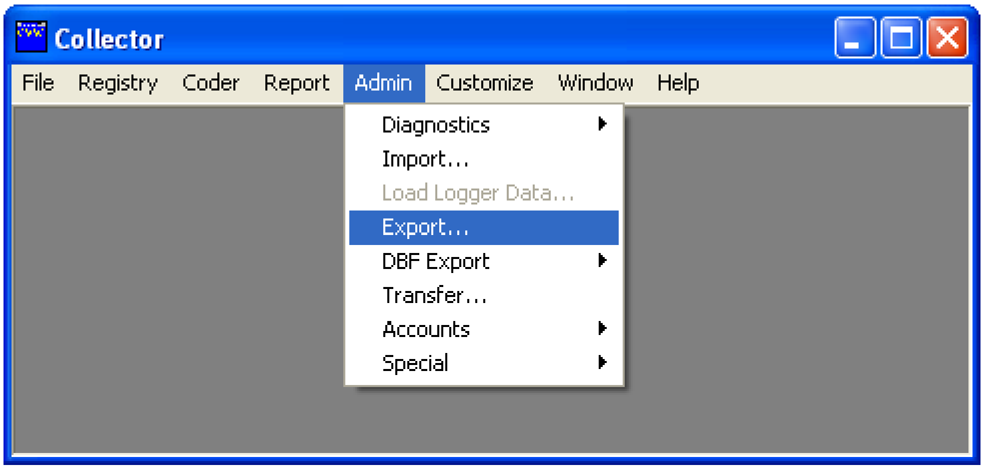
Appendix
Import/Export

Import/Export

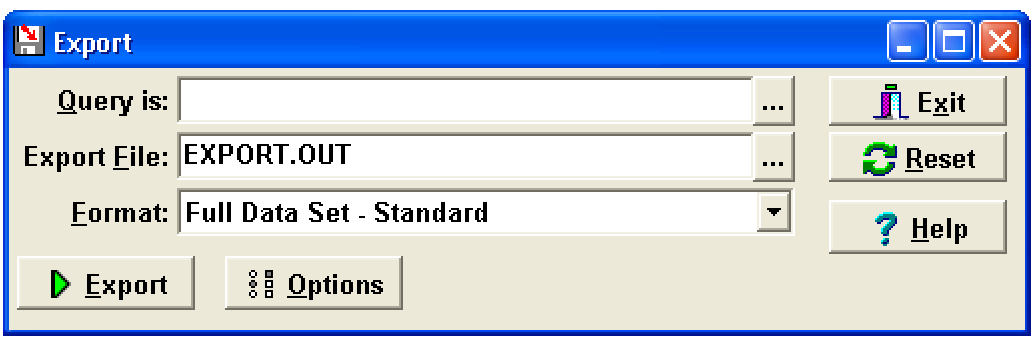
The Import/Export feature is used to move data between Collector installations, i.e., from a database located on a laptop computer to a database located on a desktop computer. Data from external sources can all be imported.

⇨ *Exporting Data Out of Collector*

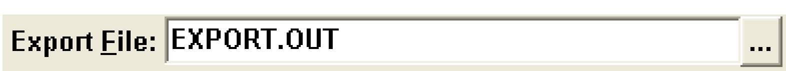
1. Select "Export" from the ***Admin*** menu and the "Export" screen will appear.



2. You may restrict the range of record included in your export file by using a query.



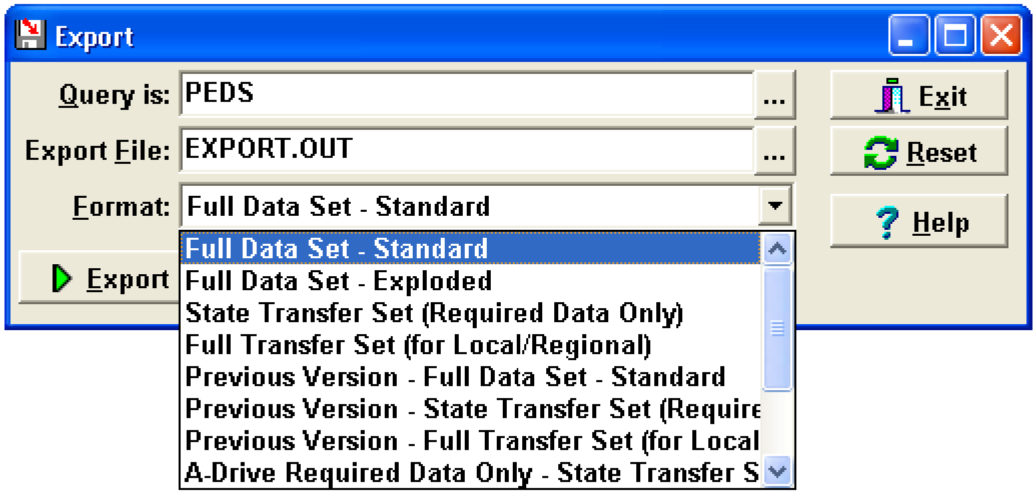
3. Click the "Export File" menu button and select a storage location and file name for the export file.



Note: The default export filename is "EXPORT.OUT". Modify the name of your export file to include an identifier such as the date to prevent overwriting existing export files.

Note: The default export file storage location is in your Collector directory for local installations (usually C:\CollectW) or your Client directory for network installations (usually C:\CNS_COLL).

4. Click the “Format” drop-down and select the export file format.



Full Data Set – Standard Select this option to export all data elements in a comma delimited format with all memo fields in a colon-delimited format.

- Comma Delimited: Values for each element separated by commas.
- Colon Delimited: Each data element with an associated value is found on a separate line in the following format: ElementNam:Value.

Note: This format is typically used if you are sending this information to a floppy disc as it requires less file storage space.

Important Note: If commas are embedded in text strings found in the comma delimited section of the export file, this is an indicator that you should use the “Full Data Set – Exploded” format.

Full Data Set – Exploded Select this option to export all data elements in a colon delimited format.

- Colon Delimited: Each data element with an associated value is found on a separate line in the following format: ElementNam:Value.

Note: This format is typically used for most export tasks.

State Transfer Set Select this option to export all required data elements included in your transfer data set.

Full Transfer Set Select this option to export all data elements included in your transfer data set.

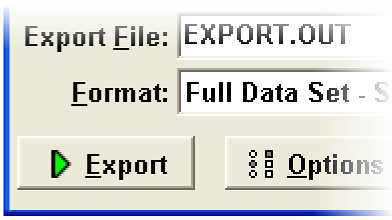
Prev Version – Full Data Set Format to be used at the direction of Technical Support.

Prev Version – State Transfer Set Format to be used at the direction of Technical Support.

Prev Version – Full Transfer Set Format to be used at the direction of Technical Support.

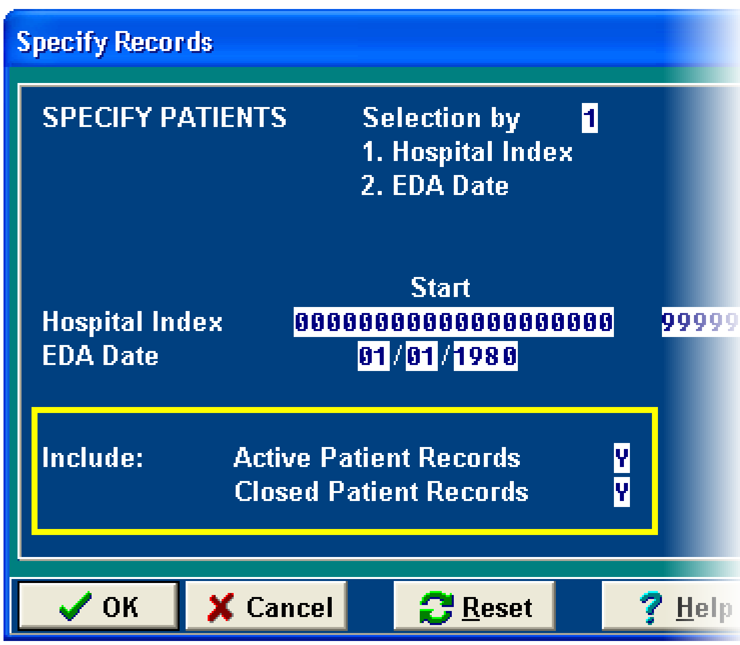
A-Drive Required Data Only	Format to be used at the direction of Technical Support.
B-Drive Required Data Only	Format to be used at the direction of Technical Support.
A-Drive Full Transfer Set	Format to be used at the direction of Technical Support.
B-Drive Full Transfer Set	Format to be used at the direction of Technical Support.
Other Import/Export Data Set	Format to be used at the direction of Technical Support.

5. Click [Export] to create your export file.



6. Verify the information on the "Specify Records" screen and click [OK].

Note: It is recommended that you export active and closed records separately. Create a separate file for each if importing into another Collector database.

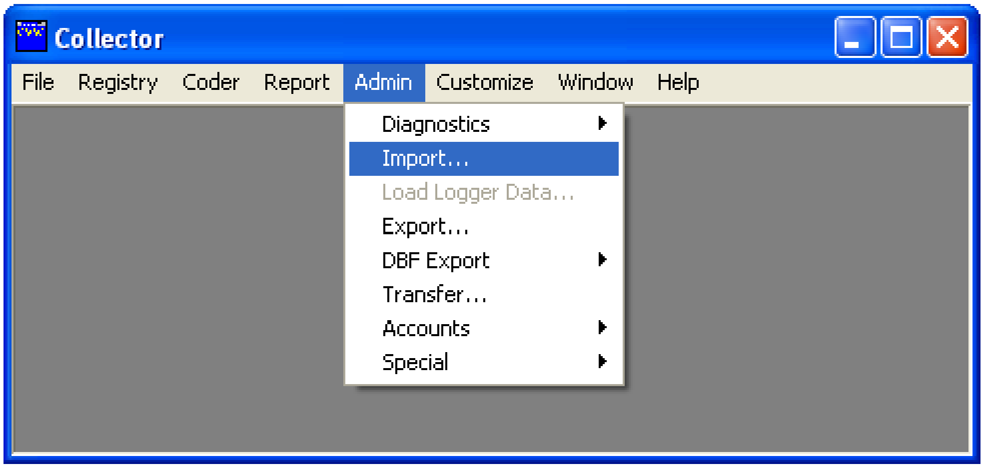


7. Your export file has now been created and stored in the specified location.

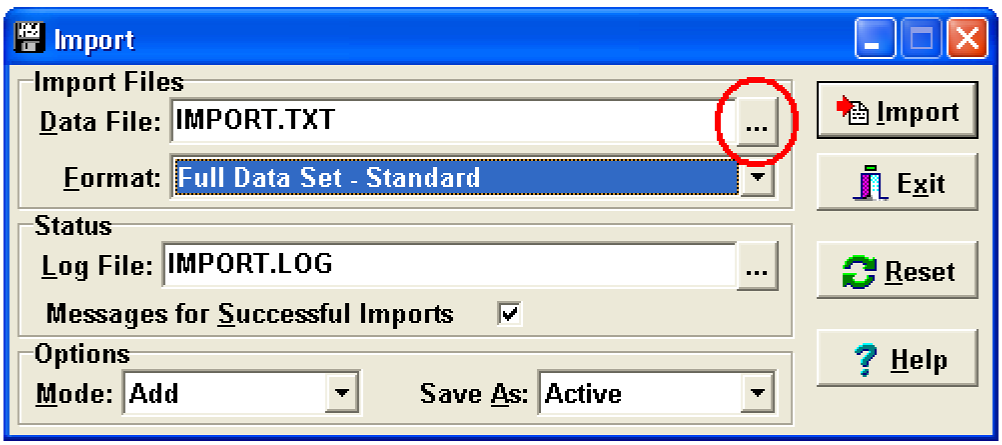
⇨ *Importing Data Into Collector*

Important Note: MIS or Data Processing Personnel at your institution should be consulted before attempting to import data using this option.

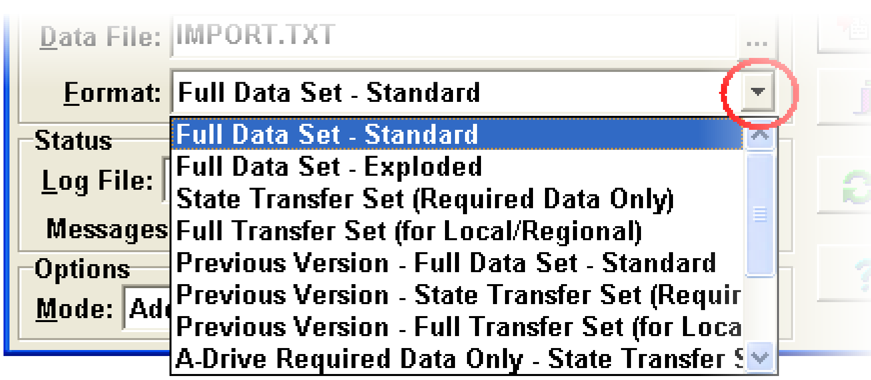
1. Select "Import" from the ***Admin*** menu; the "Import" screen will appear.



2. Click the "Data File" menu button and select a Collector export file or other appropriate file to import.



3. Click the "Format" drop-down arrow and click to select the appropriate import format from the list.

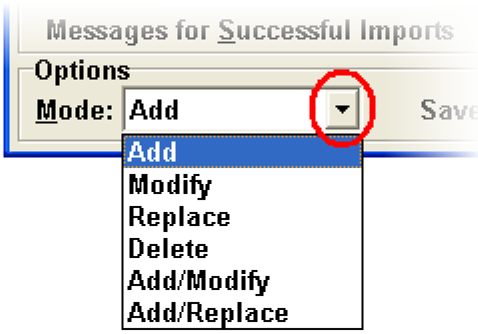


Note: The import format must match the format of the data file to be imported.

4. Click the menu button to define the file name and storage location for the import “Log File”.

5. If you would like to see messages for each successful import in the log file, click the “Messages for Successful Imports” checkbox.

6. Click the “Mode” drop-down arrow and select an import mode from the list.



Add — Use this mode to add new records to your database. This mode will check to see if the record currently exists in your database. If the record exists it will not import the record.

Modify — Use this mode to add new information to or to change information in existing records. This feature will not overwrite existing data with blanks from the import file. This feature will not add new records.

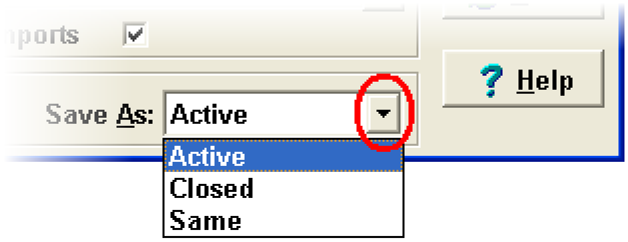
Replace — Use this mode to wipe out and completely replace matching records in your database.

Delete — Use this mode to delete records from your database. All matching records imported in delete mode will be removed from your database.

Add/Modify — Use this mode to add <u>and</u> modify records in your database. This mode will check to see if the record currently exists in your database and if it exists will modify the information. If it does not exist, it will add the new record to your database.

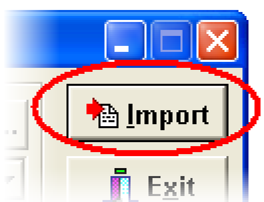
Add/Replace — Use this mode to add records and replace data for existing records in your database. This mode will check to see if the record currently exists in your database and if it exists will replace the information. If it does not exist, it will add the new record to your database.

7. Click the “Save As” drop-down arrow and click to select the mode in which to save your imported records.

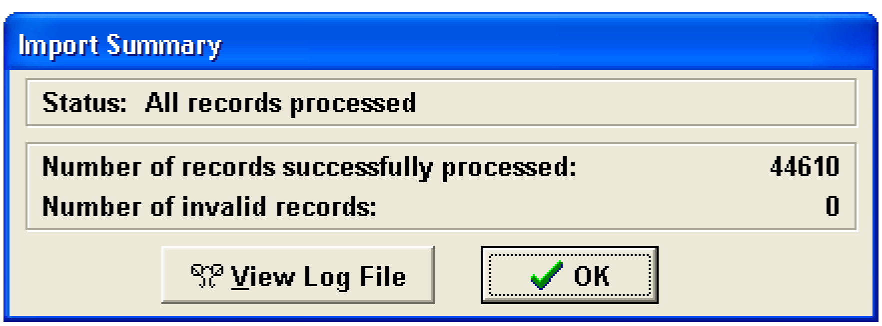


Active	New and updated records will be saved as active regardless of their previous record status.
Closed	New and updated records will be saved as closed regardless of their previous record status.
Same	New records will be saved as active. The status of existing records that have been updated will remain the same as the database into which the records are being imported.

8. Click [Import] to import the selected file into your database.



9. The “Import Summary” screen will appear displaying the number of successfully imported records and number of invalid records.



10. Click [View Log File] to view a summary of imported records. “OK” messages for successfully imported records will appear in the import log file if “Messages for Successful Imports” is selected on the “Import” screen.

11. Click [OK] to exit the “Import Summary” screen.